Oracle Sales Cloud
Implementing Sales

Release 13 (update 18C)
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# Understanding Import and Export

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Preface

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

Using Oracle Applications

Using Applications Help

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

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

You can also read Using Applications Help.

Additional Resources

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

Conventions

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

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

Documentation Accessibility

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

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

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

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

Audience and Scope

This guide provides conceptual information and procedures used to implement sales application components and features. It's intended for sales application administrators, and in some cases, application implementors, as they implement, configure, and use administrative components of the sales applications.

This guide does not cover:

* Initial tasks to set up the sales applications. Initial sales setup tasks are covered in the Getting Started with Your Sales Implementation guide. It is assumed you have used the getting started guide to complete your initial setup before performing the tasks in this implementation guide.
* Tasks required to integrate with other applications or platforms, such as Oracle Financials Cloud or Human Capital Management. For these setup guides, see the relevant documentation on the Oracle Help Center.
* Tasks typically performed by sales users in the transactional pages, such as sales representatives and sales managers working in leads and opportunities. For those tasks, see the Using Sales guide.
* Most configuration tasks, such as adding fields, changing field labels, and the like. For these procedures, see the Extending Sales guide.

The Related Guides topic in this chapter contains lists of the other guides you may want to consult as you implement, configure, and use the sales applications.

Related Guides

You may want to consult other guides in addition to this one as you implement, administer, maintain, and use the sales applications.

You can find these guides on the Oracle Help Center, linked in the Related Topics section of this topic.

Implementation Guides

The following table lists implementation guides.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Getting Started with Your Sales Implementation</td>
<td>Describes your initial implementation procedures, based on a simple sales-force-automation use case.</td>
</tr>
<tr>
<td>Getting Started with Your Incentive Compensation Implementation</td>
<td>Describes how to get started with Oracle Incentive Compensation implementations.</td>
</tr>
<tr>
<td>Getting Started with Your Partner Relationship Management Implementation</td>
<td>Describes how to set up Oracle Partner Relationship Management features to support common use cases.</td>
</tr>
</tbody>
</table>
### Guide Description

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>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>Implementing Enterprise Contracts</td>
<td>Contains conceptual information and procedures needed to implement contract management features.</td>
</tr>
<tr>
<td>Implementing Incentive Compensation</td>
<td>Contains information on implementing sales compensation and payment plans.</td>
</tr>
<tr>
<td>Implementing Sales</td>
<td>(This guide) Contains conceptual information and procedures needed to implement components and features of the sales applications.</td>
</tr>
<tr>
<td>File-Based Data Import</td>
<td>Describes how to use file-based import or update legacy and other data into the sales applications from external applications.</td>
</tr>
<tr>
<td>Understanding File-Based Data Import and Export</td>
<td>Describes how to import legacy and other data into the sales applications using file-based data import.</td>
</tr>
<tr>
<td>Understanding Import and Export Management</td>
<td>This guide is intended for anyone who is involved in importing and exporting business data into and from the sales applications.</td>
</tr>
<tr>
<td>Securing Sales</td>
<td>Contains information to help setup users and sales administrators configure access to sales functionality and data.</td>
</tr>
<tr>
<td>Sales Security Reference</td>
<td>Lists the predefined security data that is included in the sales offering.</td>
</tr>
<tr>
<td>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>Deploying Sales for IBM Notes</td>
<td>Describes how to install, uninstall, configure, administer, and upgrade Oracle Sales for IBM Notes.</td>
</tr>
<tr>
<td>Deploying Sales for Outlook</td>
<td>Describes how to install, uninstall, configure, administer, and upgrade Oracle Sales for Outlook.</td>
</tr>
</tbody>
</table>

You may also want to consult the Getting Started with Oracle Cloud guide.

### User Guides

The following table lists user guides.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Using Customer Contracts</td>
<td>Contains information about creating and managing customer contracts.</td>
</tr>
<tr>
<td>Using Customer Data Management</td>
<td>Contains information about managing customer information and customer data quality.</td>
</tr>
</tbody>
</table>
## Analytics Guides
The following table lists analytics guides.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating and Administering Analytics for Sales</td>
<td>Contains information for administrators as they access and build analytics and make them available to salespeople.</td>
</tr>
<tr>
<td>Oracle Cloud Administering Transactional Analyses</td>
<td>Describes implementation procedures for Oracle Transactional Business Intelligence, a real-time, self-service analysis and reporting solution offered to Oracle Fusion application users to create analyses and analyze them for daily decision-making.</td>
</tr>
</tbody>
</table>

## Configuration Guides
The following table lists Sales configuration guides and one common cloud configuration guide.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extending Sales</td>
<td>Describes how to create and modify objects and to configure the user interfaces and navigation menus.</td>
</tr>
<tr>
<td>Groovy Scripting Reference for Application Composer</td>
<td>Explains the basics of how you to use the Groovy scripting language to enhance the sales applications.</td>
</tr>
<tr>
<td>Oracle Applications Cloud Configuring and Extending Applications</td>
<td>Describes the tools and concepts for configuring applications.</td>
</tr>
</tbody>
</table>

## Common Applications Guides
The following table lists Oracle cloud guides for common features.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Applications Cloud Using Functional Setup Manager</td>
<td>Describes how to use Oracle Functional Setup Manager (also known as the Setup and Maintenance work area) to implement the applications.</td>
</tr>
</tbody>
</table>
### Related Topics

- Oracle Help Center
Implementing Sales: Overview

To start an implementation of sales, a user with the Application Implementation Consultant role (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB) must opt in to the offerings applicable to the deploying company’s business requirements. Refer to the Oracle Applications Cloud Using Functional Setup Manager guide to manage the opt-in and setup of your offerings.

Understanding the Sales Offering

Offerings, functional areas, and features work together in your implementation.

- **Offerings:** An offering represents a collection of business processes that are supported by Oracle Applications Cloud. Each subscription of Oracle Cloud provides license to use one or more offerings and they’re the starting point of all implementations. An offering consists of multiple functional areas and features.

- **Functional Areas:** A functional area represents one or more business sub-processes and activities within its parent offering. It may represent a core operation of the offering, or may represent an optional activity which may or may not be applicable to your business.

- **Features:** Features are optional business practices or methods applicable to the functional areas. Like functional areas, you can decide to opt into or opt out of features depending on the requirements of your business processes.

Use the Sales offering to manage your accounts and contacts, pursue your leads and opportunities, and manage your sales forecast. The Sales offering also includes Incentive Compensation, which streamlines the roll out of new plan initiatives and provides productivity tools to reduce administrative costs.

**Note:** Do not use the Incentive Compensation offering to implement Incentive Compensation. Instead, see the Implementing Incentive Compensation guide for implementation information.

The following table specifies the primary functional areas of this offering. For the full list of functional areas and features in this offering, use the Associated Features report that you review when you plan the implementation of your offering.

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Foundation</td>
<td>Set up common components of the sales application including geographies, search, activities, tasks, notes, social collaboration, approvals, audit policies and data quality.</td>
</tr>
<tr>
<td>Sales Catalog and Products</td>
<td>Define the sales catalog and product hierarchy.</td>
</tr>
<tr>
<td>Accounts and Contacts</td>
<td>Configure the setup to import accounts and contacts.</td>
</tr>
<tr>
<td>Sales Campaigns</td>
<td>Configure and manage templates, lookup choices, and other options for sales campaigns.</td>
</tr>
</tbody>
</table>
### Functional Area | Description
--- | ---
Leads | Define and manage the setup related to sales leads creation. Define option settings, such as assignment rules, assessment, and qualification templates. Update lookup values that provide choices for sales lead attributes.
Opportunities | Set up opportunity management options and assignment.
Territories | Set up territory management options, dimensions, and metrics.
Sales Forecasting | Configure forecasting parameters, such as time periods, and the processes for generating and refreshing forecasts.
Quotas | Configure the setup to support sales quotas.
Business Plans | Formal statement of strategic business goals and how they can be achieved within a given period. For example, a partner business plan may state the goal for the partner to achieve sales of $500,000 of vendor’s products, during FY2016.
Partner Relationship Management | Set up partners, partner programs, marketing development funds, and deal registrations.
Sales Contracts | Manage configuration settings for creation and management of sales contracts.
Subscriptions | Manage configuration settings for the creation and management of subscriptions.
Incentives | Configure incentive compensation options to calculate and pay incentives such as commissions and bonuses.
Integrations | Configure integrations for extending the sales application.

### Key Features in this Update

Here are the key features in this update:

- **Actionable Infolets:** Actionable infolets let salespeople interact and take actions such as accepting a lead directly from the infolets dashboard.
- **Access to Quotes in Sales:** Salespeople can access quotes in sales, including searching for quotes from the work area or the global search. They can also use the Quotes list page to see a list of relevant quotes.
- **Integration with Office 365:** Oracle Sales Cloud for Office 365 adds the power of Oracle Engagement Cloud to Microsoft’s Outlook desktop and Outlook on the web.

### Related Topics

- Oracle Applications Cloud Using Functional Setup Manager
- Planning Your Implementation: Procedure
- Implementing Incentive Compensation
Performing Sales Setup Tasks

For most sales setup tasks, you use the Setup and Maintenance work area to access the setup pages associated with the component or feature. The Setup and Maintenance work area is also known as the Functional Setup Manager.

For sales setup tasks, a user with the Sales Administrator role performs many, if not most, of the setup and configuration tasks. For more information on typical sales administrator tasks, see the topic, About the Sales Administrator.

You navigate to the Sales offering to access setup tasks:

1. Sign in as the sales administrator or as a setup user and navigate to the Setup and Maintenance work area. The Setup page appears with an offering selected.

   🌐 Tip: To navigate to Setup and Maintenance, you can use the Navigator menu or the menu underneath your user image or name in the global header.

2. In the Setup page, select the Sales offering.
3. The Setup: Sales page appears with a list of functional areas.
4. In the list of functional areas, click the functional area that has the tasks you need to access.
   
   A list of required tasks for the area is displayed.
5. In the list of tasks that appears, find the task you want and select it. (If the task you want is not in the list, show All Tasks in the tasks filter.)
   
   The setup page for the task appears.

For more information about Functional Setup Manager, see the Oracle Applications Cloud Using Functional Setup Manager guide and the related topics.

**Related Topics**

- About the Sales Administrator

- Oracle Applications Cloud Using Functional Setup Manager

- Functional Setup Manager: Overview

System Requirements

Oracle cloud applications have specific system requirements, including supported resolutions when using internet web browsers. In addition, access to the applications using mobile devices requires additional considerations. You can find the latest system requirements and supported browser resolution settings on the system requirements page at http://www.oracle.com/us/products/system-requirements/overview/index.html. For previous releases, scroll to the end of the page and find the system requirements link for the applicable previous release.

**Related Topics**

- System Requirements for Oracle Applications Cloud
Migrating Data Between Environments: Points to Consider

Almost all Oracle Fusion application implementations require moving data from one instance into another at various points in the life cycle of the applications. For example, one of the typical cases in any enterprise application implementation is to first implement in a development or test application instance and then deploy to a production application instance after thorough testing. You use various methods or tools to accomplish the migration of data.

For more information, see the Importing and Exporting Setup Data chapter of the Oracle Applications Cloud Using Functional Setup Manager guide.

Related Topics

- Oracle Applications Cloud Using Functional Setup Manager
- Exporting Offering Setup
- Importing Offering Setup
3 Using Profile Options, Lookups, and Scheduled Processes

Profile Options, Lookups, and Scheduled Processes: Overview

Profile options, lookup types, and scheduled processes let you configure application behavior and refresh data. Briefly, the following are the purposes of profile options, lookup types, and scheduled processes:

- **Profile options**: Let you configure the application behavior.
- **Lookup types**: Provide the lists of values in applications. Many lookup types can be modified to fit your business needs.
- **Scheduled processes**: Refresh data in the applications.

You can find additional information on profile options, lookup types, and scheduled processes in this chapter and in the related topics.

Profile Options

Profile Options: Explained

Profile options let you configure and control application data centrally. Administrators and setup users manage profile options in the Setup and Maintenance work area.

Profile options store various kinds of information. The following table lists some examples.

<table>
<thead>
<tr>
<th>Type of Information</th>
<th>Profile Option Setting Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>User preferences</td>
<td>Provides access to social networking features</td>
</tr>
<tr>
<td>Installation information</td>
<td>Identifies the location of a portal</td>
</tr>
<tr>
<td>Configuration choices</td>
<td>Changes UI skins and behaviors</td>
</tr>
<tr>
<td>Processing options</td>
<td>Determines how much information to log</td>
</tr>
</tbody>
</table>

Profile Option Hierarchy Levels

Profile options can be set at different levels, such as site level or user level. The application gives precedence to certain levels over others, when multiple levels are set. The allowed levels come preconfigured with the application.
In the predefined profile option levels, the hierarchy levels and their precedence are:

1. User: This level affects only the current user. It has the highest precedence, over Site and Product.
2. Product: This level affects a product or product family. The application gives it priority over Site level. However, if the user level is set, the user level takes precedence.
3. Site: This level affects all applications for a given implementation. The application gives it the lowest precedence when other levels are set. If no other levels are set, however, it is the highest level.

As a best practice, set site-level profile option values before specifying values at any other level (where available). The profile option values specified at the site-level work as the default until profile option values are specified at the other levels.

The following table shows an example of the predefined profile option hierarchy levels and their priorities.

<table>
<thead>
<tr>
<th>Level</th>
<th>Priority</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site</td>
<td>Lowest</td>
<td>Currency for a site is set to Euros.</td>
</tr>
<tr>
<td>Product</td>
<td>Supersedes Site</td>
<td>Currency for the product or set of products is set to UK pound sterling.</td>
</tr>
<tr>
<td>User</td>
<td>Highest, supersedes Product</td>
<td>Currency for a user is set to US dollars.</td>
</tr>
</tbody>
</table>

You can find additional information on profile options in the related topics.

**Related Topics**
- Profile Options and Related General Preferences: How They Work Together
- Profile Options: Overview

**How can I access predefined profile options?**

Search for predefined profile options using the Manage Profile Options task.

1. In the Setup and Maintenance work area, go to the Manage Profile Options task.
2. On the page, enter any of the search parameters and click Search.

   **Tip:** If you don’t know the profile option code or the display name, use the Application or Module fields to filter search results.

3. Click a profile option to view its details.

**Importing Profile Values: Procedure**

Use the Import option on the Manage Administrator Profile Values page to import profile values in bulk and associate them with a profile option.

**Prerequisite**
The file containing the profile values is available in the document repository of Oracle WebCenter Content.
Importing Profile Values

To import profile values:

1. Sign in to the application as an implementation consultant or an administrator.
2. In the Setup and Maintenance work area, search for and open the Manage Administrator Profile Values task or a similar task used for importing profile values.
3. In the Profile Option: Profile Values section, from the Actions menu, select Import.
4. On the Import User Profile Values dialog box, select the WebCenter Content account to which the file was uploaded.
5. Enter the name of the file containing the profile values. The name here must match with the name of the file uploaded to the selected account.
6. Click Upload. The profile values are imported.

Note: If the import fails, click the link to the log file on the confirmation dialog box and examine the cause of failure.

Related Topics
- Importing Flexfields, Lookups, or Profile Values Using Web Services: Example

File Format for Importing Profile Values: Explained

To import profile option values into the application, you create a text file with the values and upload the file to the Oracle WebCenter Content document repository. The file must follow a specific format, as described here. After the file is in the document repository, you can then import the profile values into the application following the instructions in the Importing Profile Option Values: Procedure topic.

To create a file containing the profile values, include the following headers:

- **ProfileOptionCode**: The profile option code.
- **LevelName**: Must contain the value (Site, Product, or User).
- **UserName**: Must correspond to the registered user name in the application. Don’t provide any other shortened or coded name of the user.
- **ProfileOptionValue**: The profile value to be imported.

While creating the file, adhere to the following guidelines:

- Use a vertical bar or pipe ( | ) as a delimiter between fields for both header and value rows.
- Set the file encoding to UTF-8 without the Byte Order Mark (BOM), as per the Oracle WebCenter Content specification.

Here’s a sample file that contains the header values at the beginning of the file, followed by line entries of the two profile values that are to be imported. For importing several profile values, add more line entries in a similar format.

```
ProfileOptionCode|LevelName|UserName|ProfileOptionValue
AFLOG_BUFFER_MODE|USER|APP_IMPL_CONSULTANT|TEST
AFLOG_LEVEL|USER|APPLICATION_DEVELOPER|FINEST
```

Related Topics
- Files for Import and Export: Explained
- Files for Import and Export: Points to Consider
• Uploading Files to WebCenter Content Server: Procedure
• Profile Options: Overview

Lookup Types

Lookup Types: Explained

Lookup types in the applications provide the lists of values in application fields that are drop-down lists. For example, when closing an opportunity, salespeople can pick a reason that an opportunity was won or lost from the Win/Loss Reason field, which is a drop-down list. The values in that list are derived from the lookup type, MOO_WIN_LOSS_REASON, which has several potential values known as lookups, each with its own unique lookup code and a meaning that displays in the UI.

Configuring Lookup Types

You can configure many lookup types to fit your business needs. The level at which a lookup type is extensible determines whether the lookups in that lookup type can be edited. The levels are: User, Extensible, and System.

The following table shows which lookup management tasks are allowed at each level.

<table>
<thead>
<tr>
<th>Allowed Task</th>
<th>User</th>
<th>Extensible</th>
<th>System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deleting a lookup type</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Inserting new codes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Changing the wording that displays on the page</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Updating start date, end date, and enabled fields</td>
<td>Yes</td>
<td>Yes, only if the code is not predefined data</td>
<td>No</td>
</tr>
<tr>
<td>Deleting codes</td>
<td>Yes</td>
<td>Yes, only if the code is not predefined data</td>
<td>No</td>
</tr>
<tr>
<td>Updating tags</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Updating module</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

If a product depends on a lookup type, the configuration level must be System or Extensible to prevent deletion. After the configuration level is set for a lookup type, it cannot be modified. The configuration level for lookup types created using the Define Lookups page is by default set at User level.

Sales Lookup Types

You find lookup types by accessing the associated task in the Sales offering in the Setup and Maintenance work area. Here are some of the common sales lookup tasks or task lists:
To access sales lookup types:

1. Sign in as a setup user and navigate to the Setup and Maintenance work area.
2. In Setup and Maintenance, go to the Sales offering.
3. In the list of functional areas, click the area where the lookup appears. See the list at the end of this procedure for more information.
   A list of tasks for the area is displayed.
4. In the list of tasks, click the lookups task.
5. In the lookup types page, modify the lookup type as needed.

The following are the Sales lookup type tasks and the functional areas where they appear:

- **Sales Foundation functional area:**
  - Manage Geography Lookups
  - Manage Applications Core Standard Lookups
  - Manage Activity Standard Lookups

- **Users and Security functional area:**
  - Manage Resource Role Lookups
  - Manage Resource Lookups

- **Accounts and Contracts functional area:**
  - Manage Group Lookups
  - Manage Source System Lookups
  - Manage Hierarchy Lookups
  - Manage Trading Community Common Lookups
  - Manage Party Usage Lookups
  - Manage Relationship Lookups
  - Manage Contact Point Lookups
  - Manage Trading Community Organization Lookups
  - Manage Trading Community Location Lookups
  - Manage Trading Community Person Lookups
  - Manage Contact Lookups
  - Manage Customer Account Lookups
  - Manage Customer Center Lookups

- **Sales Catalog and Products functional area:**
  - Manage Product Group Lookups

- **Sales Campaigns functional area:**
  - Manage Marketing Standard Lookups

- **Leads functional area:**
  - Manage Sales Lead Standard Lookups
Manage Set Enabled Lookups

- Opportunities functional area:
  - Manage Set Enabled Lookups

- Territories functional area:
  - Manage Territory Management Non-extensible Lookups

- Business Plans functional area:
  - Manage Business Plan Non-extensible Lookups
  - Manage Objectives Non-extensible Lookups

- Partners functional area:
  - Manage Partner Lookups

Set-Enabled Lookup Types
Several applications support lookup types at the reference set level, allowing you to present different lists of values for different business units. You can find these in the Manage Set Enabled Lookups task within the functional area that supports these lookup types.

Related Topics
- Reference Data Sets: Explained

How can I access predefined lookups?

Search for predefined lookups using any of the manage lookups tasks.

1. In the Setup and Maintenance work area, go to any of the following tasks that contains the lookups you are looking for:
   - Manage Standard Lookups
   - Manage Common Lookups
   - Manage Set-enabled Lookups

2. Enter any of the search parameters and click **Search**. If you don’t know the lookup type or the meaning, use the **Module** field to filter search results.

3. Click a lookup type to view its lookup codes.

***Tip***: Click the Query By Example icon to filter the lookup codes.

Related Topics
- Using Query By Example: Procedure
How can I edit lookups?

On any of the Manage Lookups pages, you can edit the existing lookup codes of a lookup type or add new lookup codes. You can edit lookups using the following tasks in the Setup and Maintenance work area:

- Manage Standard Lookups
- Manage Common Lookups
- Manage Set-enabled Lookups

Each task contains a predefined set of lookup types that are classified and stored. Open a task to search and edit the required lookup. However, you may not be able to edit a lookup if its configuration level doesn’t support editing.

Why can't I see my lookup types?

Lookup types are classified using tasks that involve a group of related lookups, such as Manage Geography Lookups. Each task gives you access only to certain lookup types. However, the generic tasks provide access to all lookups types of a kind, such as common lookups associated with the Manage Common Lookups task.

If the lookup types in an application are available in the standard, common, or set-enabled lookups view, they’re are central to an application. However, lookup types defined for a specific application are managed using the task or task list for that application.

Importing Lookups: Procedure

On each page pertaining to the tasks of managing the Standard, Common, and Set Enabled lookups, use the Import option to import the lookup type and lookup code information.

Prerequisite

The separate files containing the lookup types and lookup codes are already available in the document repository of Oracle WebCenter Content.

Importing Lookups

To import lookups:

1. Sign in to the application as an implementation consultant or an administrator.
2. In the Setup and Maintenance work area, search for and open a relevant lookups task list or task that you can use to import lookups.
3. In Search Results, from the Actions menu, select Import.
   
   The Import Lookups dialog box appears.
4. Select the WebCenter Content account to which the files were uploaded.
5. Enter the names of the separate files containing the lookup type and lookup code information. The names here must match with the names of the files uploaded to the selected account.
6. Click Upload. The lookup details are imported.
Note: If the import fails, click the link to the log file on the confirmation dialog box and examine the cause of failure.

Related Topics
- Importing Flexfields, Lookups, or Profile Values Using Web Services: Example

File Format for Importing Lookups: Explained

To import lookups into an application, you create separate text files containing the lookup types and lookup codes and upload them to the Oracle WebCenter Content document repository. The files must follow a specific format, as described here. After the files are in the document repository, you can then import the lookup types and lookup codes into the application following the instructions in the Importing Lookups: Procedure topic.

While creating the file, adhere to the following guidelines:

- Use a vertical bar or pipe (|) as a delimiter between fields for both header and value rows.
- Set the file encoding to UTF-8 without the Byte Order Mark (BOM), as per the Oracle WebCenter Content specification.

The following sections contain details about the specific lookup types and codes.

Prerequisite

You must have worked with lookups in Oracle Cloud applications.

Standard and Common Lookups

The lookup types and codes are similar for standard and common lookups. To create a file containing the lookup types, include the following headers:

- **LookupType**: The lookup type.
- **Meaning**: The display name of the lookup type.
- **Description**: The description of the lookup type. This header is optional.
- **ModuleType**: The module with which the lookup type is associated.
- **ModuleKey**: The module code.

Here’s a sample file that contains the header values at the beginning of the file, followed by line entries of the two lookup types that are to be imported. For importing several lookup types, add more line entries in a similar format.

<table>
<thead>
<tr>
<th>LookupType</th>
<th>Meaning</th>
<th>Description</th>
<th>ModuleType</th>
<th>ModuleKey</th>
</tr>
</thead>
<tbody>
<tr>
<td>AFLOG_22APR_1</td>
<td>Log1</td>
<td>AFLOG_desc_1</td>
<td>APPLICATION</td>
<td>FND</td>
</tr>
<tr>
<td>PROD_22APR_2</td>
<td>Product1</td>
<td>PROD_desc_2</td>
<td>APPLICATION</td>
<td>FND</td>
</tr>
</tbody>
</table>

To create a file containing the lookup codes, include the following headers.

- **Required headers:**
  - **LookupType**: The lookup type.
  - **LookupCode**: The lookup code associated with the lookup type.
  - **DisplaySequence**: The sequence position at which the lookup code appears in the list of values.
- **EnabledFlag**: Indicates the status of the lookup code, whether it’s enabled for display or not.
- **Meaning**: The display name of the lookup code.

**Optional headers:**
- **StartDateActive**: Beginning of the date range during which the lookup code is active and visible on the page.
- **EndDateActive**: End of the date range during which the lookup code is active and visible on the page.
- **Description**: Description of the lookup code.
- **Tag**: Any tag associated with the lookup code that may be used for a quick reference or retrieval of information.

Here’s a sample file that contains two lookup codes:

```plaintext
LookupType|LookupCode|DisplaySequence|EnabledFlag|StartDateActive|EndDateActive|Meaning|Description|Tag
TASK_22APR_1|Code1_1|1|Y|11/12/2014|1/5/2015|TASK_22apr_1|Task_desc_1|Tag1_1
TASK_22APR_1|Code1_2|2|N|1/1/2014|1/11/2015|TASK_22apr_2|Task_desc_2|Tag1_2
TASK_22APR_2|code2_1|3|N|11/12/2012|1/7/2015|TASK_22qpr_2_1|Task_desc_2|tag2_1
TASK_22APR_2|code2_2|3|Y|11/12/2012|1/7/2015|TASK_22qpr_2_2|Task_desc_2_2|tag2_2
```

**Set Enabled Lookups**

To create a file containing the set enabled lookup types, include the following headers:

- **LookupType**: The lookup type.
- **Meaning**: The display name of the lookup type.
- **Description**: The description of the lookup type. This header is optional.
- **ModuleType**: The module with which the lookup type is associated.
- **ModuleKey**: The module code.
- **ReferenceGroupName**: Name of the reference group that contains the reference data set.

Here’s a sample that contains two set enabled lookup types:

```plaintext
LookupType|Meaning|Description|ModuleType|ModuleKey|ReferenceGroupName
CODE_22APR_1|CODE_22apr_1|Code_desc_1|APPLICATION|FND|BU_APAC
CODE_22APR_2|CODE_22qpr_2|Code_desc_2|APPLICATION|FND|BU_APAC
```

To create a file containing the set enabled lookup codes, include the following headers.

- **Required headers**:
  - **LookupType**: The lookup type.
  - **LookupCode**: The lookup code associated with the lookup type.
  - **DisplaySequence**: The sequence position at which the lookup code appears in the list of values.
  - **EnabledFlag**: Indicates the status of the lookup code, whether it’s enabled for display or not.
  - **Meaning**: The display name of the lookup code.
  - **SetName**: Name of the reference data set.

- **Optional headers**:
  - **StartDateActive**: Beginning of the date range during which the lookup code is active and visible on the page.
  - **EndDateActive**: End of the date range during which the lookup code is active and visible on the page.
  - **Description**: Description of the lookup code.
Tag: Any tag associated with the lookup code that may be used for a quick reference or retrieval of information.

Here's a sample file that contains the header values at the beginning and lists four set enabled lookup codes to be imported. For importing several lookup codes, add more entries in the same format.

<table>
<thead>
<tr>
<th>LookupType</th>
<th>LookupCode</th>
<th>DisplaySequence</th>
<th>EnabledFlag</th>
<th>StartDateActive</th>
<th>EndDateActive</th>
<th>Meaning</th>
<th>Description</th>
<th>Tag</th>
</tr>
</thead>
<tbody>
<tr>
<td>DATA_22APR_1</td>
<td>Code1_1</td>
<td>1</td>
<td>Y</td>
<td>11/12/2014</td>
<td>1/5/2015</td>
<td>DATA_22apr_1</td>
<td>Data_desc_1</td>
<td>Tag1_1</td>
</tr>
<tr>
<td>DATA_22APR_1</td>
<td>Code1_2</td>
<td>2</td>
<td>N</td>
<td>1/1/2014</td>
<td>1/11/2015</td>
<td>DATA_22apr_2</td>
<td>Data_desc_2</td>
<td>Tag1_2</td>
</tr>
<tr>
<td>DATA_22APR_2</td>
<td>code2_1</td>
<td>3</td>
<td>N</td>
<td>11/12/2012</td>
<td>1/7/2015</td>
<td>DATA_22apr_2</td>
<td>Data_desc_2</td>
<td>tag2_1</td>
</tr>
<tr>
<td>DATA_22APR_2</td>
<td>code2_2</td>
<td>3</td>
<td>Y</td>
<td>11/12/2012</td>
<td>1/7/2015</td>
<td>DATA_22apr_2</td>
<td>Data_desc_2</td>
<td>tag2_2</td>
</tr>
</tbody>
</table>

Related Topics

- Files for Import and Export: Explained
- Files for Import and Export: Points to Consider
- Uploading Files to WebCenter Content Server: Procedure
- Lookups: Explained

Scheduled Processes

Scheduled Processes: Explained

Run scheduled processes to manipulate a set of records for a specific business need, or to get printable output with information about certain records. Some processes do both, for example, to import records and provide a report about them.

Report Output

A scheduled process that provides output, or the output itself, is also referred to as a report.

- Many types of reports are available, for example regulatory statements or listings of records that meet specified parameters.
- Predefined templates determine the report layout.

Parameters

A scheduled process might have parameters that you can set to control which records are included or how they’re affected. For example, a process updates only the records that are effective within the date range that you define.

Submission

Each scheduled process that you run is based on a job. The job is the executable that determines what the process can do and what options you can set for the process.

You can submit the same process using different parameters and other settings. Each process submission has a unique process ID.

Process Sets

A process set is a scheduled process that’s based on a job set, which contains multiple jobs for one process submission.
Note: In some cases, when you submit a scheduled process, the job logic causes other processes to automatically run. This isn’t the same as a process set.

Related Topics

- Process Sets: Explained
- Submitting Scheduled Processes and Process Sets: Procedure
- Managing Scheduled Processes That You Submitted: Procedure
- Creating Job Sets: Procedure

Viewing Details About Predefined Scheduled Processes: Procedure

To use web services to run predefined scheduled processes, you require details about the processes. View job definitions that the processes are based on, for example to get information about parameters. You might also need to find security requirements for running the scheduled process.

Job Definitions

A job definition contains the metadata that determines how a scheduled process works and what options are available during submission.

To view job definitions:

1. Go to the Setup and Maintenance work area.
2. From the Application Extensions functional area, open any of these tasks as appropriate:
   - Manage Enterprise Scheduler Job Definitions and Job Sets for Financial, Supply Chain Management, and Related Applications
   - Manage Enterprise Scheduler Job Definitions and Job Sets for Human Capital Management and Related Applications
   - Manage Enterprise Scheduler Job Definitions and Job Sets for Customer Relationship Management and Related Applications
3. In the Manage Job Definitions tab, select your job definition and click Edit.

Note: Predefined job definitions are marked with an asterisk.

4. Cancel after you get the information you need.

Security

Privileges provide the access required to run specific scheduled processes. Privileges are granted to duty roles, which are granted to job roles. To see which job roles inherit the required privileges, use the Security Console or the security reference manuals for the appropriate product family.
4 Setting Up Users and Security

User Setup Overview

Setting Up Users and Security: Overview

Access to the cloud application functionality and data is secured using role-based access control. In a role-based access control model, users are assigned roles, and roles are assigned access privileges to protected system resources. Initial access is limited to one initial user that Oracle creates. Using this initial user, you create other required users, such as setup users, the sales administration user, and application users. You then provision each user with roles, which provide access to application functions and data.

Sales users who access the transactional UI, such as the Leads and Opportunities work areas, are created as resources and are known as sales resources.

To set up default preferences for users and roles, you access the Security Console as a setup user or other user with the IT Security Manager job role. Only setup users, or other users with the IT Security Manager job role, can access the Security Console. You perform user-related tasks both during implementation and later as requirements emerge. If you are a new customer, follow the steps in the Getting Started with Your Sales Implementation guide. For ongoing maintenance of users, use the Users and Security functional area in Setup and Maintenance and the Users, Roles and Delegation task in the Navigator. For more information about creating and importing users, see the Getting Started with Your Sales Implementation guide. For more information about setting up security and provisioning roles to users, see the Securing Sales guide. You can find these guides on the Oracle Help Center site, linked in the Related Topics section of this topic.

LDAP Identity Store

The Oracle Cloud authentication providers access the LDAP identity store, which is a logical repository of enterprise user identity data. Your LDAP directory stores definitions of LDAP user accounts. In general, changes you make to user accounts are automatically synchronized between the sales applications and your LDAP directory server. However, you must also run processes on a daily basis to manage information exchange between your application and your LDAP directory server. For information, see the chapter about setting up application security in the Securing Sales guide.

Setup Tasks in the UI and Other Setup Options

As a setup user, you access multiple tasks in Setup and Maintenance to create and maintain users. You also have additional setup options to consider. The following table describes these tasks and setup options.

<table>
<thead>
<tr>
<th>Setup Task or Option and Navigation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Job Roles Task:</td>
<td></td>
</tr>
<tr>
<td>Navigation: Setup and Maintenance</td>
<td></td>
</tr>
<tr>
<td>&gt; Sales Offering &gt; Users and Security functional area</td>
<td>Oracle provides many predefined job roles. The relevant sales roles are listed in the Getting Started with Your Sales Implementation guide. You perform the Manage Job Roles task to:</td>
</tr>
<tr>
<td>&gt;</td>
<td></td>
</tr>
<tr>
<td>• Review the role hierarchy of a job or abstract role.</td>
<td></td>
</tr>
<tr>
<td>• Create custom job and abstract roles.</td>
<td></td>
</tr>
<tr>
<td>• View the roles assigned to a user and list the users who have a specific role.</td>
<td></td>
</tr>
<tr>
<td>Setup Task or Option and Navigation</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| **Manage Duties Task:** | You perform the Manage Duties task to:  
  - Review the duties of a job or abstract role.  
  - Manage the duties of a custom job or abstract role.  
  - Create custom duty roles.  
  
  This task opens the Roles tab of the Security Console. |
| **Manage Data Security Policies Task** | You use the Manage Data Security Policies task to manage the data security policies that determine grants of entitlement to a user or role on an object or attribute group. This task opens the Roles tab of the Security Console. |
| **Users, Roles and Delegations Task** | You create application users in the UI using the Users, Roles and Delegations task. A user with the IT Security Manager job role performs the Manage Users tasks.  
  
  **Note:** You can’t perform bulk imports of data into the sales applications using the Import Worker Users task available from the Users and Security functional area task list. However, you can create users by importing legacy users from a file using the Manage File Import Activity task available from the Setup and Maintenance work area. For information on importing users, see the Getting Started with Your Sales Implementation guide. |
| **Manage HCM Role Provisioning Rules Task** | Oracle provides predefined role mapping rules for provisioning many of the standard job roles included with the application. However you can create any additional role mappings you need to control the provisioning of roles to application users using the Manage HCM Role Provisioning Rules task. For example, you can create a role mapping to provision the Channel Sales Manager role automatically to specified sales managers. |
| **File-Based Data Import** | You can import users in bulk using file-based data import. See the Getting Started with Your Sales Implementation guide for more information. |
| **Import Partner Users Task** | You can also import partner contact data using the Import Partner Users task. For more information, see the Getting Started with Your Partner Relationship Management Implementation guide. |
| **Single Sign-On Authentication** | Single sign-on authentication, which enables users to sign in once and access multiple applications, is optionally available for user authentication. If your enterprise has moved from a traditional on-premises environment to an Oracle Cloud implementation, you might want to use your existing identity management solution for authenticating your employees, and you might also want to provide a single sign-on experience. Implementing federated single sign-on lets you provide users with single sign-on access to applications and systems located across organizational boundaries. For additional information, see Oracle Applications Cloud Service Entitlements (Doc ID 2004494.1) on My Oracle Support at https://support.oracle.com. |
| **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. Users who can’t access the Security Console can reset only their own passwords using the Set Preferences link in the Settings and Actions menu available by clicking their user name in the application or by using the Forgot Password link on the sign-in page. See the Getting Started with Your Sales Implementation guide for more information. |

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**Oracle Sales Cloud**  
**Implementing Sales**  
**Chapter 4**  
**Setting Up Users and Security**  

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**ORACLE**
Updating Email Addresses

Use the Users tab in the Security Console work area to change user email addresses. You can use the procedure described in this topic to update addresses of both setup users and sales users. If you are updating the email addresses of sales users, then you can also use the same import process you use to create them. See the Getting Started with Your Sales Implementation guide for more information.

**Note:** Other data security tasks listed in the Users and Security functional area task list do not apply to the sales applications. Follow the guidance in the Getting Started with Your Sales Implementation guide and the Securing Sales guide.

### About Sales Resources

After creating your setup users and the sales administrator, you create sales resources. Creating resources is covered in the Getting Started with Your Sales Implementation guide. Ongoing maintenance of sales resources is performed by the sales administrator and by other transactional users, such as sales managers. Sales resources themselves also can update their own information. Some of these tasks (setup-related) are covered in this chapter. For tasks related to maintaining sales resource information, such as profiles, photos, and the like, refer to the Using Sales guide.

**Related Topics**
- Getting Started with Your Sales Implementation guide
- Securing Sales guide
- Authentication chapter of the Securing Sales guide
- Managing Resources chapter of the Using Sales guide
- Oracle Help Center

### Defining Setup Users: Overview

Among the initial activities when setting up the application is the creation of users who perform setup tasks.

Oracle creates an initial user for you when your environment is provisioned. This initial user is configured to perform security tasks, which include the creation of other users and the granting of additional privileges. The initial user can create other users, known as setup users, to help with application setup. The setup user performs the tasks in implementation projects, sets up enterprise structures, creates application users, and administers security.

Use the Manage Users task in the Setup and Maintenance work area to create setup users. For information about creating setup users, see the Getting Started with Your Sales Implementation guide.

**Related Topics**
- Getting Started with Your Sales Implementation guide
- Securing Sales guide
Using Test Email Accounts During User Setup

During an implementation, you may set up users, enter contact information, and test business flows that trigger automatic emails. During this stage of your implementation, you may want to prevent emails from being sent to real people. This topic details the best way to prevent sending email to real people, using discard email domains that Oracle has made available for this purpose.

As you implement Oracle cloud applications, you may want to set up users (such as sales representatives or employees) and contacts (such as customers or household members) in your system to model the organizations with which you work and to test your business flows. Email address is an attribute of these user and contact records, and Oracle cloud applications will automatically send email to these users and contacts as you test your business processes. Examples of these business processes include user activation, sales campaigns, and appointment invitations.

Established Discard Email Domains

An improper way to suppress the emails is to use fictitious email addresses because this causes email bounces. Fictitious emails generally take three forms:

- An incorrect user identifier at a valid domain
- A random domain
- A domain that does not exist

Using fictitious email addresses can have numerous unintended consequences, including unintentionally sending email to a real person or damaging the reputation of the IP address that sends out the email, potentially flagging it as a sender of spam. For example, you might send an email to tina.best@ssf.com, thinking that ssf is just a random alphabetic sequence and not an actual domain. However, your email is actually sent to the Spruce Street Foods (ssf.com). The Spruce Street Foods email server must then determine if there is a valid recipient and, if not, make a reputation decision about the sender’s IP address.

To avoid the undesirable conditions discussed here, Oracle cloud applications have established email domains in each of its data centers that you can use temporarily during setup. Any email sent from Oracle cloud applications to one of the discard domains will not leave the data center. Instead, it will be discarded by the mail servers during the send process. You can turn any recipient address into a discard address by replacing the domain information with one of the discard domains. So, in the example presented here, we might use tina.best@discard.mail.us1.cloud.oracle.com.

The following table shows the available discard domains and the data centers that they are associated with.

<table>
<thead>
<tr>
<th>Discard Domain</th>
<th>Data Center</th>
</tr>
</thead>
<tbody>
<tr>
<td>@discard.mail.us1.cloud.oracle.com</td>
<td>Austin</td>
</tr>
<tr>
<td>@discard.mail.us2.cloud.oracle.com</td>
<td>Chicago</td>
</tr>
<tr>
<td>@discard.mail.us6.cloud.oracle.com</td>
<td>Ashburn</td>
</tr>
<tr>
<td>@discard.mail.ca2.cloud.oracle.com</td>
<td>Markham</td>
</tr>
<tr>
<td>@discard.mail.ca3.cloud.oracle.com</td>
<td>Calgary</td>
</tr>
<tr>
<td>@discard.mail.ap1.cloud.oracle.com</td>
<td>Sydney</td>
</tr>
</tbody>
</table>
Discard domains cross data center boundaries. You can use any of them, no matter which data center supplies your service. Oracle provides data center-specific domains in case you are concerned about geopolitical boundaries and want to ensure that discard data remains in your data center region.

Discard domains are also available for government and defense data centers. For details on these restricted data centers, log a service request for cloud operations through My Oracle Support.

If you are importing your users, you can use the discard domains in your import file and then go back later and re-import the users with the real domain information. For more information on importing users, see the importing users topics in the Getting Started with Your Sales Implementation guide.

Related Topics

- Getting Started with Your Sales Implementation guide
- Securing Sales guide

About the Sales Administrator

A user with the Sales Administrator job role performs most setup tasks related to sales the sales applications.

Although he does not participate directly in the sales process, the sales administrator user is created as an organization resource and employee in the organization hierarchy. For steps detailing how to create the sales administrator user, see the Getting Started with Your Sales Implementation guide.

The following are the tasks the sales administrator user typically performs:

- Download task lists and setup reports.
- Set sales profile options.
- Configure extensible lookups for sales.
- Run most of the scheduled processes for sales.
- Set up the sales calendar.
- Set up accounts and contacts options.
- Manage global search options.
- Function as a centralized territory administrator.
- Configure opportunities.
- Configure forecast criteria.
- Administer sales quotas.
- Configure work assignment.
- Manage price books.
- Create and manage sales products and promotions.
- Set up and administer the sales catalog.
- Configure Oracle Social Network.
- Set up mobile applications.
- Set up partner functionality.
- Perform configuration tasks.
- Perform file-based data import.
- Add and configure sales infolet pages.
- Add analytics to application pages, such as accounts, leads, and opportunities.
- Add analytics to the Analytics page.
- Create analytics in business intelligence (BI).
- Edit analytics in BI.

**Note:** The sales administrator does not have the same setup permissions as a setup user. He has permissions required to set up and administer sales features and components, but not the higher-level permissions required to implement enterprise and security features.

For more information, see the following guides:

- Securing Sales
- Sales Security Reference
- Getting Started with Your Sales Implementation

**Related Topics**

- [Securing Sales guide](#)
- [Getting Started with Your Sales Implementation guide](#)
- [Sales Security Reference guide](#)

**Sales Resources**

**Understanding Sales Resources**

Sales users who access the applications to participate in transactional activities such as managing opportunities and leads, are known as sales resources. During implementation, you create sales resources and build your resource organization at the
same time. After implementation, you maintain sales resources, such as by modifying their organization assignments, adding or removing permissions, creating additional users, and so on.

You can create users directly in the user interface or you can import them from a file.

For more information about creating and maintaining users, see the following guides:

- Getting Started with Your Sales Implementation
- Securing Sales

You can find these guides on the Oracle Cloud Documentation site, linked in the Related Topics section of this topic.

Making an Employee a Sales Resource

You can make an employee a sales resource by performing the following steps.

1. Sign in to the application as a sales administrator.
2. Click Navigator and select Resource Directory.
3. Click Identify Resources in the Tasks region.
   The Identify Resources page appears.
4. Fill in the Person Name or Registry ID. You do not need to enter the complete name. The application automatically searches for any characters entered, even if it is only a single character.
5. Select Employee as the Usage and click Search.
6. Select the employee and click Add as Resource.
   A message asks you to confirm that the selected employee be enabled as a resource.
7. Click OK on the confirmation message.
   The employee is now also a sales resource.
8. In the Resource Details section, specify the From Date and To Date for the resource.
9. Select the Organization and the Role that you want to assign to the resource.
10. Optionally, in the Sales Person Information section, specify additional information about the resource.
11. Click Save and Close.

Additional Capabilities for Sales Resources

The following functionality also is available for sales resources:

- Proxy users: Sales resources can designate another resource as a proxy to sign in to the applications and perform tasks on their behalf. Proxy users are helpful when a resource can’t perform the tasks in person during a specific period. For more information, see the topic, Proxies: Explained.
- Restricted users: Some sales resources may need access to transactional data, but do not need to modify that data. You can create restricted sales resources who can view sales data, but cannot change data. For more information, see these topics: Sales Restricted Users: Explained and Creating Sales Restricted Users.
- Records transfer: When necessary, you can move records, such as opportunities or leads, from one sales resource to another using the Mass Transfer feature. For more information, see these topics: Transferring Records Between Users: Explained and Transferring Records Between Users: Procedure.

Related Topics

- Oracle Cloud Documentation
- About Sales Users: Explained
Managing Resources: Explained

Managing resources involves viewing and modifying a resource’s profile, organization membership, role assignment, skills, additional contact information, and salesperson information.

All the resources within the deploying company can view any resource’s profile. However, only the administrator can modify a resource’s profile, organization and team membership, and role assignment. Managers can modify the skill information of their direct and indirect reports. However, resources can only modify their own profiles, skills, and additional contact information.

Managing Resource Profiles
Resource profile management involves managing a user’s profile, including the resource’s core skills, photo, time zone, additional contact information, and so on. As part of managing a resource’s profile, the administrator specifies the dates between which the resource is available to the organization. The administrator also ensures that role assigned to the resource is within the period mentioned in the profile.

Managing Organization Membership
At any point in time, a resource belongs to an organization, and the administrator can assign this resource to any other organization within the deploying company.

Managing Resource Role Assignment
The administrator or the organization manager can assign or modify resource roles within an organization, with one role assigned to a resource at a time. However, administrators can also assign multiple roles to resources outside an organization.

Note:
- The dates of the resource role assignment must be within the date range during which the resource is active in the deploying organization.
- An organization can have only one manager.

Configuring Extensible Resource Pickers
An administrator can configure extensible resource pickers enabling Sales users to search and associate users to business objects relevant to their business flows. For more information about configuring the resource search, see the Related Topics section.

Related Topics
- Configuring Resource Search: Explained
- Configuring Resource Search: Procedure

Resource Directory: Explained

This topic explains the Resource Directory and how you can use it.

The Resource Directory offers detailed information about all the resources within the deploying organization. The Resource Directory also enables you to find and communicate with other resources, and to network and collaborate with them.
You can access the Resource Directory using the following path: **Navigator > Resource Directory.** You can also perform some of the functions of the resource directory using the Manage Resources setup task.

You use the Resource Directory to perform the following tasks:

- View and modify your profile
- View your organization information
- View information related to other organizations
- View the profiles of other resources
- Communicate with other resources

**Note:** To enable desktop pages for Resource Directory in Application Composer, set the profile option `HZ_RESOURCE_ALLOW_CUSTOMIZATION` to Yes. The default value of this profile option is No.

### Updating Resource Skills: Examples

This example illustrates the various contexts in which you can update your skills in Oracle Resource Management.

You can add a wide range of skills into Oracle Resource Management. For the sake of convenience, let us categorize these into core skills, achievements, and mandatory requirements.

Each of these skills must be used in specific contexts as described in the following scenarios.

#### Updating Core Skills

Skills that reflect your key abilities are categorized under the Core Skills head, such as competencies, degrees, languages, licenses and certifications, skills, and problem codes.

- Use the Competencies option to record your key abilities as a resource. For instance, if you have the ability to quickly internalize and analyze complex information, list it here.
- Use the Degrees option to record your educational degrees.
- Use the Languages option to record your proficiency with the various languages you know.
- Use the Licenses and Certifications option to record any educational licenses and certifications you may have received. For instance, if you have a Six Sigma certification, list it here.
- Use the Skills option to list out any specific software or engineering skills you may have. You can search for these skills by category, product, platform, or component.
- Use the Problem Codes option to record your ability to manage and remedy specific service-related problems that may arise within your company. For instance, if you are skilled at troubleshooting hardware issues, list it here.

#### Updating Achievements

Skills that reflect your key achievements and uncommon abilities are categorized under the achievements head, such as accomplishments, honors, awards.

- Use the Accomplishments option to record any major task you completed that reflects your abilities as an individual. For instance, if you completed a rather difficult task in a short deadline, list it here.
- Use the Honors and Awards option to record any special honors or awards you may have received. For instance, if you were the recipient of a certificate of merit award, list it here.
Updating Mandatory Requirements

Skills that capture the mandatory requirements, which you have met for your employment, are categorized under the mandatory requirements head. Thus, job requirements and work requirements are part of mandatory requirements.

- Use the Job Requirements option to update all job requirements you have met. For instance, many companies require you to take a medical test before you join. If you took such a test before you joined the company, list it here.
- Many roles have specific requirements that employees must fulfill before these roles can be assigned to them. Such requirements can be listed out under the Work Requirements head. For instance, if you are willing to travel overseas on duty, list it here.

Resource Roles

Resource Role Assignment: Explained

Resource role assignment is the task of assigning roles to active resources within the deploying company. These roles are previously set up, and have associated security privileges. Thus, when you assign a specific role to resources, they automatically receive access to specific business functions within the company.

A resource can only have one role associated to organization membership and additionally can be assigned more individual resource roles. A resource can be part of any one organization at any given point of time during active resource assignment range (start date and end date).

Defining Resource Roles: Explained

A resource role, such as salesperson, denotes the function of a resource in an enterprise. Oracle Applications Cloud comes with some predefined resource roles. You may either use these predefined, out of the box resource roles, or you may use the Manage Resource Roles task in the Setup and Maintenance work area to create additional resource roles or to modify predefined resource roles. Note that you must map these newly created resource roles to one or more job roles and abstract roles before you can use them. Access to business data and privileges to run business flows comes through job roles and abstract roles.

Using Role Tags While Defining Resource Roles

You can set several tags while defining resource roles. Use these tags along with the organization hierarchy information to define the reporting hierarchy of resources.

- Use the Manager tag to define a role as a supervisor role. You must assign a resource organization to a manager resource, who will have visibility into all opportunities assigned to the members of that resource organization.
- Use the Member tag to make a role a subordinate role in the resource hierarchy.
- Use the Administrator or Lead tag to indicate the nature of the tasks that resources who are assigned these roles perform within the hierarchy.

Additionally, you can use these tags along with the resource organization hierarchy information to maintain manager-to-manager relationships within the organization. For example, Resource A is a manager who heads a sales organization and Resource B heads his own sales organization. Then, both Resource A and Resource B report into Resource C, the Sales Vice President. Similarly, you can create resource organizations and manager resources, and relate managers to higher-level managers, building the resource organization and reporting hierarchies of the company.

Assigning Resource Role Types

Resource role types organize roles into logical groups. This simplifies role assignment and assignment tracking. For example, the Partner resource role type defines a set of partner-specific roles, such as partner sales representative and partner sales.
manager. Use the Sales resource role type and the Marketing resource role type to categorize the appropriate sales and marketing roles for internal employees or contingent worker resources.

Provisioning Roles: Explained

This topic explains role provisioning, and the difference between resource roles and job roles.

Role provisioning automates the provisioning and deprovisioning of roles, based on resource role assignment. You use job roles to provide access privileges. You can use Setup and Maintenance, Manage HCM Role Provisioning Rules task to map the job roles to the resource roles. Associating a resource role to a user enables the user to access the tasks and data based on the job roles assigned to the resource role.

Difference between Resource Roles and Job Roles

Resource roles are used to filter resources, generate reporting hierarchies, and define security policies. A resource role may be assigned to a resource without a user account, while a job role can only be provisioned to a resource who has a user account. Job roles are used to define the security privileges for a user account.

HCM Job-to-Role Mapping: Explained

A human capital management (HCM) job indicates the designation of a person in the deploying company. A job-to-role mapping associates HCM jobs with specific resource roles. You can establish job mapping for a resource role in Setup and Maintenance, Manage Resource Roles task. This mapping simplifies the task of assigning resource roles to new employees or contingent workers, resulting in time and cost efficiency.

For example, an employee joins the Sales department as a sales representative and the employee’s job is already mapped to the Salesperson resource role. In this case, the employee is automatically converted to a resource and is assigned the mapped resource role. Thus, you can place new employees faster in organizational and reporting hierarchies.

Resource Members, Role Assignment Dates, and Active Dates: How They Work Together

Every resource in the deploying company has start and end dates for a specific activity. When you assign resources to organizations, you must ensure that their date of assignment is within the employment date range.

Resource Active Dates and Resource Assignment

When you identify internal or partner employees as resources, you can specify the time for which they are active within the organization. By default, the date you identify a resource becomes the start date, but there is no end date listed. Thus, an identified resource is active from the day of activation and you can assign the resource to any organization for an infinite period. A resource can be part of any one organization at any given point of time during active resource assignment range (start date and end date).

Resource Skills and Resource Assignment

To get the best out of resources, you may define their skills relevant to the organization within which you deployed them. Determine whether a resource’s skill set matches the requirements of an organization. Then, deploy the resource as appropriate for a period of time that falls within the active dates specified for the concerned resource.

Resource Roles, Job Roles, and Abstract Roles: Explained

A resource role, such as salesperson, denotes the function of a resource in a resource organization. Job roles and abstract roles provide users access to business data and privileges to run business flows.

Oracle follows the industry standard Role Based Access Control approach to security. In Oracle Applications, the privileges are bundled in:

- Job roles, such as Sales Representative, which correspond to the jobs that the person is doing in your organization.
• Abstract roles, such as Employee or Contingent Worker, which permit users to carry on tasks that are common to all employees or resources.

For example, the Sales Manager job role makes it possible for a user to perform all of the sales manager duties, such as reviewing sales team performance and approving forecasts. The Employee abstract role adds the ability to access reports and manage personal profile information. The Resource abstract role makes it possible for a user to be assigned as a sales resource to accounts and opportunities.

When you create a user as an employee with the Sales Manager resource role provided by Oracle, as shown in the following figure, 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 abstract role.

Resource Organizations

Resource Organizations and Organization Usage: Explained
You can assign organization usage information to resource organizations to classify them based on how you want to use them. For instance, you can assign the Sales Organization usage to resource organizations engaged in sales activities. This enables you to sort organizations based on their usage, simplifying your task of working with them.
Resource Role and Resource Organization Components: How They Work Together

This topic explains how resource roles and resource organizations work together.

A single resource can belong to only one resource organization and be associated with only a single resource role, during a given period. The organizations and organization hierarchies that a resource belongs to determine the reporting relationships for that resource.

Resource Roles

A resource role, such as salesperson or sales manager, denotes the function of a resource in an enterprise from the perspective of the deploying company. A resource role not only describes who a resource is in the enterprise, but also specifies the role a resource performs within the context of an organization or team. A resource can have only one role in a resource organization during a given period.

Note: You can assign only one role to a resource at a time.

Resource Organizations

A resource organization represents the internal organization and structure of the deploying company. Resource organizations are hierarchically structured, and the organization hierarchy helps to derive the reporting relationships. A resource can be a part of different organizations within the deploying company, and can have separate roles in each.

Primary Resource Organization by Usage: Explained

A resource can belong to only a single resource organization during a given period. For each organization, you can assign different resource roles to a resource. When you assign a resource to one resource organization, the organization becomes the primary organization for the resource for a specific usage.

A resource organization becomes a primary resource organization by usage for a resource, if it meets the following criteria:

- Resource must be a member of the concerned organization.
- Resource organization must be classified as an organization with the specific usage.

For example, if you classify the resource organization as a marketing organization by usage, then the resource organization becomes the primary resource organization for the resource for marketing.

Organization Memberships and Role Assignments: Explained

When you assign a resource to an organization, you must also specify the role the resource is required to play in the organization. This helps ensure clarity on the tasks that you can assign to a resource and helps define where the resource is situated within the organization’s hierarchy.

Note: An organization can have only one manager. A resource can have only one role in a resource organization during a given period.

Associating Business Units with Resource Organizations: Explained

You can associate resource organizations with multiple business units. The first business unit that you associate with a resource organization is automatically listed as the primary unit. Associating resource organizations with business units helps you to view the relevant transactional details associated with the resource, such as opportunities, leads, and so on. By associating resource organizations with business units, you can also control access to contracts that are based on business units.

Users are associated with a business unit through their resource organization membership. Resource organizations are mapped to one or more business units. When a sales user is created, the user is assigned to a resource organization, and
thereby gains access to each business unit that is mapped to the resource organization. For example, users can access relevant transactional data associated with their primary business unit, but might also have access to relevant transactional data in other business units through their resource organization.

For more information about data access and business units, see the topic, Multiple Business Units and Data Access, in the Securing Sales guide.

You can associate a resource organization to multiple business units from the Resource Directory. For more information, see the Associating Resource Organizations with Multiple Business Units: Procedure topic.

**Related Topics**
- Associating Resource Organizations with Multiple Business Units: Procedure
- Multiple Business Units High-Level Setup Steps

**Associating Resource Organizations With Multiple Business Units: Procedure**

By associating resource organizations with business units, you can control access to the transactional data available to sales resources in business objects like opportunities and leads.

Use the following procedure to associate resource organizations with multiple business units.

1. Sign in as a setup user or as the sales administrator and navigate to the Setup and Maintenance work area.
2. In Setup and Maintenance go to the Sales offering and search for and select the Manage Resource Organization Members task.
3. In the Manage Resource Organization Members page, search for and select the resource organization that you want to associate with a business unit.
4. In the Organization page, click the Business Units tab.
5. In the table, click the add row icon.
6. Select a business unit from the Business Unit list.
7. Click Save. The first business unit you selected is set as the primary business unit.
8. Similarly, select additional business units from the Business Unit drop-down list.
9. Click Save and Close.

**Related Topics**
- Multiple Business Units High-Level Setup Steps

**Adding a Sales Organization to a Sales Organization Hierarchy: Worked Example**

This example describes how you can add a sales organization to a sales organization hierarchy.

As new sales organizations are created within your company, you need to add these organizations to your company’s sales organization hierarchy.

**Creating a New Version**

2. Search and select the sales organization hierarchy you want to edit.
3. Click the Action menu. If you want to add the new organization to the sales organization hierarchy with immediate effect, select the Edit This Hierarchy Version option. If you want the new organization to display in the organization hierarchy only after a specific date, then select the Create Hierarchy Version option. If you choose the latter option, then you must specify the date from which the new version of the sales organization hierarchy must be active.
Adding a New Organization to the Sales Organization Hierarchy

2. Search and select the sales organization hierarchy to which you want to add a new organization.
3. On the Action menu, click either Edit This Hierarchy Version option or Create Hierarchy Version option.
4. In the Create or Edit Organization Hierarchy Version page, select the node in the sales organization hierarchy where you want to add the new sales organization and click the Add button.
5. Search and select the new sales organization in the Add Tree Node screen. This adds the new organization to the sales organization hierarchy.
6. Select the new organization in the hierarchy, and drag and drop it to the node where you want to place it. The organization appears in the location you specified within the selected sales organization hierarchy.
7. Click Save and Close.

Creating an Organization with Sales Usage: Worked Example

This example demonstrates how to create a resource organization with sales usage.

There are two options to create resource organizations with sales usage:

- Create an organization from an existing department
- Create a new organization

Creating an Organization from an Existing Department

You must create an organization with sales usage from an existing department if the concerned department must be reused as a sales organization. Use the following steps:

1. Navigate to the Manage Internal Resource Organizations UI page as follows: Navigator > Setup and Maintenance > Tasks > Search > Search for Manage Internal Resource Organizations.
2. You can either search for the organization whose usage you want to modify or click the Create button, select the Create from Existing Department option and specify the name of the organization in the Create Organization: Select Creation Method screen and click Next.
3. Click Actions > Add Row.
4. Specify Sales Organization as the Usage under the Organization Usages section of the screen.
5. Click Finish.

Creating a New Organization with Sales Usage

1. Navigate to the Manage Internal Resource Organizations UI page as follows: Navigator > Setup and Maintenance > Tasks > Search > Search for Manage Internal Resource Organizations.
2. Click Actions > Create.
4. Specify the name of the new organization and select Sales Organization as its usage.
5. Click Finish to save the new organization with sales usage.

Assigning a Resource to an Organization: Example

Once you have identified a resource, you can assign the resource to organizations within the deploying company. This example explains how you can assign resources to organizations.

Scenario

You must assign a resource to an organization. A resource can belong to only one organization and can have only one role in an organization during a give period.
To assign a resource to an organization, perform the following tasks.

1. Navigate to the View Resources UI page as follows: **Navigator > Resource Directory > Tasks > View Resources**.
2. Search for a resource and select it.
3. Click the **Organizations** tab. This displays the list of organizations to which the resource belongs.
4. In the Actions drop-down list, click **Create**.
5. In the **Create Organization Membership** pop-up, search and select the organization you want from the Organization drop-down list.
6. In the Actions drop-down list, click **Add Row** and select the role the resource must play in the organization.
7. Enter the From Date and To Date, and click **OK**.
8. Click **Save and Close**.

You can also assign resources to organizations by searching for organizations and adding members to the concerned organization. To assign resources to organizations by searching for organizations, perform the following operations.

1. Navigate to the View Organizations UI page as follows: **Navigator > Resource Directory > Tasks > View Organizations**.
2. Search for an organization and select it.
3. Click the organization's name to display its details.
4. Click the **Members** tab to edit the list of members assigned to the organization.
5. In the Actions drop-down list, click **Create** to assign a new resource to the organization.
6. In the Add Resource Member pop-up, select a resource from the **Resource** drop-down list.
7. Click the Add Row button to add a role to the newly-added resource.
8. Click the **Role** drop-down list and select the role the resource is required to play in the organization.
9. Enter the From Date and To Date, and click **OK**.
10. Click **Save and Close**.

**Note:**

1. The date from which a resource is a member of an organization must be on or after the date which the resource was hired.
2. You can’t reassign the resource to the same organization, if a resource was already a member of the selected organization with an end date later than the current date. You also can’t reassign the resource to the same organization, if the resource was removed from the organization before the end date.

**Restricted Users**

**Sales Restricted Users: Explained**

To do their jobs effectively, users must be able to view all the data that is relevant to their role. In some cases, however, users do not require the ability to create, update, or delete that data. You can create sales application users who have extensive privileges to view sales data, but limited privileges to change data, by provisioning users with the Sales Restricted User job role.

**Access Provided by the Sales Restricted User Job Role**

Users assigned the Sales Restricted User job role can:

- View accounts, contacts, leads, and opportunities.
• Create and modify reports and analytics.
• Update, create, and manage service requests.
• Create, update, and delete notes, tasks and activities for the Activity object.
• Edit forecasts.
• Access content in Oracle Sales Lightbox.

Assigning the Sales Restricted User job role to the following types of users provides these users with the visibility into sales data that they require, without assigning them excess privileges.

• Back-office users can view reports, edit forecasts, and view activities and interactions.
• Service representatives can view all the information available for a customer and can see leads and opportunities.
• Seasonal or administrative users can view leads and opportunities.

For additional information about creating restricted sales users, see the topic Creating Sales Restricted Users.

Creating Sales Restricted Users

You can create sales application users who have extensive privileges to view sales data, but limited privileges to create, update, or delete that data, by assigning users the Sales Restricted User job role. For example, you might want to assign the Sales Restricted User job role to accounting or legal users, to seasonal or administrative users, or to users who are assigned an Essential User license. The Essential User license provides a user with a read-only subscription to the cloud service.

Creating Sales Restricted Users

To create a sales restricted user:

1. Create the user who is to have restricted access to the application.

   For information about this task, see the topic Creating Sales Application Users.

2. When creating the user, specify the values shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person Type</td>
<td>Employee</td>
</tr>
<tr>
<td>Resource Role</td>
<td>Sales Restricted User</td>
</tr>
</tbody>
</table>

3. In the Roles region, click Autoprovision Roles.

   The user is automatically assigned the following roles:

   o Sales Restricted User job role
   o Resource abstract role
   o Employee abstract role

   A predefined rule automatically assigns the Employee abstract role to all active users who are created as employees.
Related Topics
- Creating Application Users: Worked Example

Records Transfer Between Users

Transferring Records Between Users: Explained

Mass Transfer of records lets you move records from one user to another. A record owner or any user higher than the owner in the role or territory hierarchy can transfer records from one user to the other.

Before transferring records, you must understand:
- Record Types
- Record Filters
- Record Transfer Status

Record Types

Record types are broad categories of objects or information related to a user. For example, Deal Registrations associated with a user. Currently, you can mass transfer Leads, Opportunities, and Deal Registrations that belong to a user.

Record Filters

Record Filters let you refine the list of records associated with the user for a record type. For example, you can transfer only deal registrations that were created during a time period. You can’t specify filters for all record type. The Transfer Records: Define Filters page lets you view the record types that allow filtering, and specify the record filters.

Record Transfer Status

Record transfer statuses appear in the Mass Transfer Status page and show the status of transfer jobs. The Mass Transfer processes records to ensure data integrity before transferring the records from a user to the other.

A Record Transfer job can have one of these statuses:
- In Progress: Transfer job is currently in process.
- Completed: Transfer job has been completed without errors.
- Errors: Transfer job has resulted in an error.

You can click on the transfer job name to view the record types that were transferred, the status of each record type, and the log file associated with a record type.

Transferring Records Between Users: Procedure

This procedure describes how you can transfer records from one user to the other using the Mass Transfer tool.

To transfer records from one user to another:
1. Navigate to Mass Transfer from the Tools menu.
2. In the Mass Transfer Status page, click Transfer Records.
3. In the Transfer Records: Select Owners and Records page, search for the current owner and the new owner of the records. For example, if you are transferring from Adam Smith to Samantha Hayes, then you must select Adam Smith as the current owner and Samantha Hayes as the new owner.

4. Select the types of records you want to transfer. For example, if you are transferring opportunities and leads, then you must select Opportunities and Sales Leads. The Transfer Details column lists the types of records that will be transferred.

5. Click Next.

6. Select a record type to view the filters available, and specify the filters.

7. Click Submit.

8. Click Yes in the confirmation dialog box.

The Mass Transfer Status page lists the recent mass transfer jobs and their statuses.

FAQs for Users and Security

How can I set general preferences for all users?

Use the Global Admin Preferences page to set general preferences such as language, currency, and time zone that affect all users. In the Setup and Maintenance work area, use the following:

- Functional Area: Application Extensions
- Task: Set User General Preferences

⚠️ Caution: Use this task only if you want to update preferences for all users. To update preferences for a specific user, use the General Preferences page.

If you want to set the preferences for new users whose preferences haven’t been set at all, select the Reset preferences for new users only check box. Selecting this option excludes all users whose preferences were set at some point in time.

Related Topics

- Profile Options and Related General Preferences: How They Work Together
- How can I set general preferences for myself

How do I define whether the user image, name, or initials display in the global header?

Set the User Image Display Enabled (FND_USER_PHOTO_ENABLED) profile option. If you select:

- Yes, then the user image is displayed in the global header only if the user uploaded a photo. Otherwise, the user’s initials are displayed. By default, this profile option is set to Yes.
- No, then only the user name is displayed in the global header.
What's a duty role?

Job and abstract roles permit users to carry out actions by virtue of the duty roles they include. Each predefined duty role consists of a logical grouping of privileges that represents the individual duties that users perform as part of their job. Duty roles are composed of security policies which grant access to work areas, dashboards, task flows, application pages, reports, batch programs, and so on. You can create duty roles and can include predefined and custom duty roles in custom job and abstract roles. You don't assign duty roles directly to users.

Note: For information about security policies, see the Securing Sales guide.

How can I identify a resource?

To identify specific employees, contingent workers, or partner contacts as resources, you must search for them and enable them as resources. You can use the Manage Resources task, Manage Users UI, and the Resource Directory to search persons and identify them as resources. Once you have identified these resources, you can assign them to organizations as required. Similarly, you can also identify newly added employees or contingent workers as resources.

Can I assign more than one resource role to a resource organization member?

No. One resource can only have one role within an organization.

Can I add more than one resource role to a resource?

Yes. While a resource can have only one resource role within a resource organization, a resource can have multiple roles in different organizations across the deploying company.

What's a resource organization hierarchy?

A resource organization hierarchy is a hierarchically structured representation of the way resources are grouped within a resource organization. Resource organization hierarchies can contain other organizations within them. Thus, you can include any resource organization within the deploying company to create a single global hierarchy that depicts the operational structure of your company.
Can I create a new organization hierarchy version?

Yes. To create a new hierarchy version, click **Navigator > Resource Directory > Tasks > View Organization Hierarchies** and select the hierarchy whose new version you want to create. Click **Action > Create Hierarchy Version**. Make the changes to the hierarchy as required. Specify the dates between which the organization hierarchy must be active, and click **Save and Close** to save your changes.

Can I create a new organization?

Yes. You can create organizations using the Manage Internal Resource Organizations task in Setup and Maintenance or in the Partner Management UI. You can also create resource organizations from the **User Management** UI. You can also use the UI to manage user accounts and roles, and to create employee and partner-member users.

Can I create a new organization hierarchy?

No. All organizations within your deploying company are part of a large overarching global hierarchy. Therefore, you cannot add new organization hierarchies. However, you can move existing organizations or attach new organizations to the existing hierarchy and create a new version of the hierarchy.

Once you have created a new version, specify the date from which the new version must become active. On the specified date, your new hierarchy version replaces the older hierarchy.

Can I copy a resource organization hierarchy?

No. You can only have one resource organization hierarchy active at a time within a deploying company. If you have to create a hierarchy for an organization, you must specify the reporting structure within the concerned organization and then make the organization a part of the existing hierarchy.

What happens if I delete a resource?

When you delete a resource, the resource is deleted from the Resource Directory and from the organizations with which the resource was associated. It is always best to check a resource’s usage and remove the resource from all the organizations before deleting a resource from the resource directory.

Can I create an employee or contingent worker resource?

No. You can only identify existing employees and contingent workers as resources in the Manage Resources task.
What happens when a resource quits?

When resources quit, their status is set to inactive. This automatically removes these resources from all organizations in the deploying company, and no new work objects can be assigned to them.

How can I delete a resource from an organization?

To delete a resource from an organization, you must delete the concerned resource's membership from the organization. To manage the membership of an organization, navigate to the Manage Resource Organization Members Setup and Maintenance task and select the organization concerned. Once the organization's membership details are listed, you can add, delete or edit them as required.

What happens if I delete a resource from an organization?

When you delete a resource from an organization, you effectively delete the concerned resource’s membership with the organization. This also removes the resource from the organization hierarchy.

How can I reactivate a deleted resource organization hierarchy?

To reactivate the resource organization hierarchy that you deleted, navigate to the View Organization Hierarchies page as follows: Navigator > Resource Directory > Tasks > View Organization Hierarchies. Search and select the deleted resource organization hierarchy. From the Action menu, select Edit This Hierarchy Version and set the Status to Active.

What happens if I add a resource to an organization?

When you add a resource to an organization, the resource becomes a member of the organization and a part of the organization hierarchy.

Organization membership information is part of the publicly visible details of a resource profile. This means that a resource’s organization membership and reporting structure are visible to all active resources within the organization.

How can I reuse a resource organization in multiple organization hierarchies at the same time?

A resource organization can have one resource organization hierarchy for each internal organization and one partner organization hierarchy for each partner company. You can have one active version and multiple inactive versions of resource organization hierarchies. You can include resource organizations into any of the active or inactive organization hierarchies.
Can I create multiple resources as managers within a resource organization?

No. An organization can have only one manager.

Can I create a new organization hierarchy version?

Yes. To create a new hierarchy version, click **Navigator > Resource Directory > Tasks > View Organization Hierarchies** and select the hierarchy whose new version you want to create. Click **Action > Create Hierarchy Version**. Make the changes to the hierarchy as required. Specify the dates between which the organization hierarchy must be active, and click **Save and Close** to save your changes.
Setting Up Common Components

Setting Up Common Components: Overview

Several common components provide core functionality for the applications. Common components provide functionality that spans multiple applications, such as the accounting calendar or application messages. This chapter describes many of the common components. Where appropriate, other common components have their own individual chapters or are described in other guides or help topics.

Related Topics
- Oracle Help Center

Actionable Infolets

Actionable Infolets: Overview

Actionable infolets are transactional infolets that can co-exist on the same page as BI infolets and provide a quick overview of pending tasks for salespeople, all available in a single place. Actionable infolets provide the ability to perform select actions from within the infolets without having to navigate to different detail views.

The following actionable infolets are available by default:
- My Tasks
- My Appointments
- My New Leads
- My Opportunities

The predefined actionable infolets lets you quickly navigate to relevant areas where you can perform quick actions on individual records. You can improve your sales performance tasks by prioritizing and using filters. Filtering reduces the number of searches required to view any outstanding items that might require attention.

You can personalize your actionable infolets, refresh data, create and edit data as required. Built in configuration features help you effectively plan your day thus saving valuable time. For example, you can choose to select or hide predefined filters that you want to make available on the actionable infolets.

You can also view a graphical representation of the My Leads and My Opportunities infolets. The charts display the aggregate of the defined task filters that you select.

Related Topics
- Actionable Infolets: Explained
Enabling Sales Infolets Page: Explained

Sales actionable infolets are part of other predefined sales infolets that are available as part of your sales application. You can enable the sales infolets page, if it is not enabled by default. Ensure that you have access to the job roles for which you are enabling the actionable infolets page.

To enable the sales infolets page:

1. Sign in to your application using the administrator role.
2. Ensure that you are in an active sandbox.
3. Select Configuration > Structure from the Navigator menu.
4. Click Set System Options.
   - Set System Options page opens.
5. Enable Sales Infolets.
6. Click Save and Close.
7. Publish the sandbox.
8. Verify that the sales infolets page is now enabled.

To understand how to configure the springboard and home page to fit your unique business needs, see the following guides from the Help Center (https://docs.oracle.com):

- Extending Sales
- Configuring and Extending Applications

**Related Topics**

- Personalizing Infolets: Procedure
- Setting Up Sandboxes: Procedure

Modifying Actionable Infolets: Explained

As an administrator, you can choose to modify and remove existing predefined fields (attributes) or select additional user-defined attributes to display on the actionable infolet for your users. You can apply different setting to users through either selected roles or applying the settings at the site level.

If you want to modify the My Tasks and My Appointments actionable infolets UI, then the Date, Time, and Subject attributes must be noneditable. This means that the drill down option is not available on these fields.

Record count filters selected by users take precedence over the record count setting that you set. For example, if you set 20 as the record count for the My Tasks actionable infolet, and if the user selects the Last 10 Overdue Tasks filter, then 10 records, if applicable, are displayed. You can improve your sales performance tasks by prioritizing and using filters.

**Prerequisites**

Before modifying your predefined actionable infolets, do the following tasks:

- Understand the typical workflows for working with runtime application changes.
- Ensure that you can modify the infolet by checking if the Modify Pages menu item is available in the Settings and Actions menu. If the menu item is not available, then you cannot modify the page.
• Confirm that your privileges are sufficient for modifying the page.
• Activate a sandbox.

⚠️ Note: If you delete an infolet, you can’t easily retrieve it. Contact your help desk.

Modifying Actionable Infolets Attributes
You can select and replace any of the predefined attributes that are displayed on the actionable infolets with alternate available attributes of your choice.

⚠️ Note: You can enter a blank attribute in which case nothing is displayed corresponding to the drop down position you select to enter a blank value.

The following table shows the attributes that you can modify and represents the order as they appear on the UI.

<table>
<thead>
<tr>
<th>Actionable Infolet</th>
<th>Attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Tasks</td>
<td>• Subject</td>
</tr>
<tr>
<td></td>
<td>• Activity Type</td>
</tr>
<tr>
<td></td>
<td>• Due Date</td>
</tr>
<tr>
<td>My Appointments</td>
<td>• Activity Time</td>
</tr>
<tr>
<td></td>
<td>• Subject</td>
</tr>
<tr>
<td></td>
<td>• Primary Address</td>
</tr>
<tr>
<td>My Opportunities</td>
<td>• Sales Stage</td>
</tr>
<tr>
<td></td>
<td>• Name</td>
</tr>
<tr>
<td></td>
<td>• Close Date</td>
</tr>
<tr>
<td></td>
<td>• Amount</td>
</tr>
<tr>
<td>My New Leads</td>
<td>• Rank</td>
</tr>
<tr>
<td></td>
<td>• Lead Name</td>
</tr>
</tbody>
</table>

Perform the following steps to modify the attributes of an actionable infolet:

1. Sign in to your application using the administrator role.
2. Ensure that you are in an active sandbox.
3. Navigate to the actionable infolet that you want to modify.
4. From the user name menu, select Edit Pages.
   The Edit Pages window appears.
5. Select one of the following:
   • Site to make your changes available to everyone.
   • Job Role to target a specific job role you select from the list.
6. From the actionable infolet that you want to modify, for example, My Opportunities, select Configure from the Actions menu.
   The My Opportunities actionable infolet screen is displayed with the predefined fields selected.
7. From the Layout tab, select the attributes that you want to edit from the respective drop-down lists.
8. Set and adjust the two column table widths in percentage terms by sliding your mouse along the Column Width ruler.
9. Make the changes that you want to the attribute and select another attribute to edit, if required.
10. In the **Drill Down Field**, select the item that you want to use for drilling down to the detail page of the opportunity object.
11. Click **Save and Close** when you have finished making the changes.
12. Publish the sandbox to verify your changes.

**Modifying Record Counts**

You can also change the predefined number of records to display on the infolet. The record count to display for each actionable infolet is set to the predefined value of 10. You can change this value from the following record count list of values: 10, 20, 25, or 30.

Perform the following steps to modify record counts for an actionable infolet:

1. Sign in to your application using the administrator role.
2. Ensure that you are in an active sandbox.
3. From the actionable infolet that you want to modify, for example, My Opportunities, select **Configure** from the **Actions** menu.
   The My Opportunities actionable infolet screen is displayed.
4. From the **Record Count** tab, select the number of records that you want to display on the infolet from the drop-down list.
   You can choose from the following list of values: 10, 20, 25, or 30.
5. Click **Save and Close**.
6. Publish the sandbox to verify your changes.

**Related Topics**

- Personalizing Actionable Infolets: Procedure
- Actionable Infolets: Explained

**Application Toolkit**

**Understanding Oracle Application Toolkit**

Oracle Application Toolkit provides many features that are available in many areas of the cloud service, including Oracle Applications Help, the Oracle Business Intelligence Reports and Analytics pane, and the Watchlist in the global header. In the Setup and Maintenance work area, setup users access the Define Application Toolkit Configuration task list to set up some of these components and the Define Help Configuration task list to set up Applications Help.

**Note:** The Define Application Toolkit Configuration task list is available in implementation projects only if the Application Toolkit Component Maintenance feature choice is selected.

For more information, see the online help.

**Related Topics**

- Oracle Help Center
Approval Workflows

Approval Management: Overview

Use approval management to define policies that apply to approval workflows. For example, to reflect your own corporate policies, you can specify levels of approval for transactions over a particular amount and determine how the approvals are routed.

Approval management:

- Controls workflows for business objects such as expense reports.
- Enables you to define complex, multistage task routing rules.
- Integrates with the setup in Human Capital Management (HCM) to derive approvers based on the supervisory hierarchy.

To define approval management:

- In the Offerings work area, enable the Approval Routing Administration feature at the offering level so that relevant setup tasks are available.
- In the Setup and Maintenance work area, use the following setup tasks in the Application Extensions or another functional area.
  - Manage Task Configurations
  - Manage Approval Groups

Task Configuration

Manage rule sets and rules that control approval flows.

- To configure a predefined approval policy, select the predefined rule set and click the Edit Task icon.
- To disable a predefined rule set, select the Ignore participant check box for that rule set.
- To edit the rules within a predefined rule set, you can insert, update, or delete while in edit mode.
- You can configure a specific rule to automatically approve a task without sending it to any approver.
  - Modify the routing for that rule so that it is sent to the initiator (which means the requestor is the approver).
  - Set the Auto Action Enabled option to True.
  - Enter APPROVE in the Auto Action field.

Approval Groups

Each approval group includes a set of users that you configure to act on tasks in a certain pattern. Tasks can be defined to get routed to an approval group instead of an individual user.

- You can nest approval groups within approval groups.
- You have two options for defining the group:
  - Static: Select the specific users to include in the group.
Dynamic: Provide the logic to use to determine the users in the group.

Related Topics

- Configuring Offerings: Procedure
- Accessing Tasks to Update Existing Setup Data: Procedure

Disabling and Enabling Workflow Notifications: Procedure

When workflow tasks are assigned to users, they get notifications through email and the Notifications icon in the global header. Depending on setup, notifications can be sent through other channels also, such as instant messaging. Workflow tasks are managed in the Worklist: Notifications and Approvals work area and configured in the Setup and Maintenance work area using the Manage Task Configurations or other approval setup task. If you have the BPM Workflow System Admin Role (BPMWorkflowAdmin) role, you can disable or enable these notifications for all users. For example, you can disable notifications during testing, to avoid sending test notifications to users, and then enable notifications when ready.

When you disable workflow notifications:

- The setting applies only to email notifications that are sent as part of workflow tasks, not to all emails in general.
- Users can still find their workflow tasks in the Worklist: Notifications and Approvals work area.

Setting Notification Mode

To disable or enable workflow notifications:

1. Click the Notifications icon on the global header.
2. Click More Details.
3. In BPM Worklist, click your user name and select Administration.
4. On the Application Preferences page that’s on the Administration tab, select a value from the Notification Mode list:
   - **All:** Email and any other configured notification channels are enabled. Workflow notifications are included in the global header. This is the default value.
   - **None:** All notifications are disabled, including email and new workflow notifications in the global header.
   - **Email:** Only email notifications are enabled. New workflow notifications won’t appear in the global header, and any other configured notification channels are disabled.

   **Note:** If you or another administrator has selected news feed as the default home page layout, then users also get notifications in the Things to Finish section on the home page, as well as the Notifications page. The same mode setting that applies to the notifications in the global header also applies to the Things to Finish section and the Notifications page.

5. Click Save.

Related Topics

- Setting Up Workflow Email Notifications: Overview
- Sending All Test Workflow Email Notifications to a Single Address: Procedure
Determining When Workflow Tasks Are Automatically Dismissed or Withdrawn: Points to Consider

Only workflow tasks with a final status, such as Completed or Withdrawn, can be purged and removed from users' worklists. Tasks go from the Assigned status to the Completed status when the final assignee approves or rejects the tasks, or, with for your information (FYI) tasks, when assignees explicitly dismiss the tasks. If assignees don't take actions that result in a final task status, within a certain period of time, then the tasks are automatically dismissed (FYI tasks) or withdrawn (all other tasks).

When Tasks are Eligible for Automatic Dismissal or Withdrawal

The FYI Notifications Expiration Period profile option determines when FYI tasks are eligible for automatic dismissal. In the Setup and Maintenance work area, use the following:

- Functional Area: Application Extensions
- Task: Manage Applications Core Administrator Profile Values

On the Manage Applications Core Administrator Profile Values page:

- Leave the profile option with the default value of 7, or replace it with a different number.
- The profile value represents the number of days after the FYI task is created.

When assignees don’t read or dismiss an FYI task within the specified number of days after the task was created, the task is then eligible to be automatically dismissed. All other tasks are eligible for automatic withdrawal when assignees don’t take action to send the task to a final status within six months after the task was created.

When Eligible Tasks Are Automatically Dismissed or Withdrawn

Different processes run to automatically dismiss eligible FYI tasks or withdraw all other eligible tasks.

- **FYI Tasks**: The process runs every three days, starting the first day of each month. For example, it runs on May 1, 4, 7, and so on, and again on June 1 and every three days after. So, if you leave the FYI Notifications Expiration Period profile value at 7, then depending on when the process runs, an FYI task can be automatically dismissed within seven to ten days after it’s created. The process changes the FYI task status from Assigned to Completed.

- **All Other Tasks**: The process runs every three days, starting the second day of each month. For example, it runs on May 2, 5, 8, and so on, and again on June 2 and every three days after. The process changes the status of eligible tasks to Withdrawn.

Related Topics

- Setting Profile Option Values: Procedure
- Accessing Tasks to Update Existing Setup Data: Procedure

Synchronizing Notifications in the Global Header with Workflow Tasks: Points to Consider

When workflow tasks are assigned to users, they get an email as well as a notification in the global header. They can also find all of their workflow tasks in the Worklist: Notifications and Approvals work area. The notifications in the global header don’t immediately reflect changes to the task status due to actions taken through email, the Worklist: Notifications and
Approvals work area, or BPM Worklist. Use the Synchronize Notifications in Global Header scheduled process to update the notifications with the latest task statuses, which are always reflected in the Worklist: Notifications and Approvals work area.

 ההתא
If you or another administrator has selected news feed as the default home page layout, then users also get notifications in the Things to Finish section on the home page, as well as the Notifications page. The scheduled process also applies to notifications in these UIs. For example, the Things to Finish section automatically reflects changes made in the global header, but not changes made through email until the scheduled process runs.

Scheduling the Process
In the Scheduled Processes work area, submit the Synchronize Notifications in Global Header process with a defined schedule. For example, schedule the process to run every two hours.

Effects of the Synchronization
After the scheduled process runs, notifications in the global header might move from the Pending Notifications list to the All Notifications list. For example:

1. A notification is pending a user’s approval.
2. The user approves the task using the Worklist: Notifications and Approvals work area. The task status changes, but the notification in the global header is still in the Pending Notifications list.
3. After synchronization, the notification moves to the All Notifications list because the user has changed the task status to Approved, and the notification is no longer pending action.

If the news feed home page layout is selected, then after synchronization, the notification:
- Is removed from the list in the global header
- Is no longer a card in the Things to Finish section
- Moves from the Assigned to Me tab on the Notifications page to the All tab

The scheduled process doesn’t update the title of notifications in the global header. Similar to email subjects, the notification titles are static.

Related Topics
- Submitting Scheduled Processes and Process Sets: Procedure

Archiving and Purging Workflow Tasks: Explained
Workflow tasks with a final status, such as Completed and Expired, can be archived and purged. Archiving keeps a copy of the task data for audit, data retention or analysis, and other purposes. Purging removes the completed tasks from users’ worklists and permanently deletes the original data.

Archive
Tasks are automatically archived once a month without you doing any setup. You can’t change or stop this automatic archive. You can, however, also run the Archive Workflow Tasks scheduled process as needed; for example, you need the latest data archived immediately for reporting purposes. The process includes all eligible tasks that aren’t yet archived.

Archived data includes task details, approval history, comments, and attachments. How you view or use the archived data depends on the products you’re using. For example, the data might be displayed in a table on a page, or available through a business intelligence subject area that you can select to create an analysis.
### Purge

Archived tasks that were last updated over 30 days ago are immediately purged after the monthly automatic archive, without you doing any setup. You can't change or stop this automatic purge. The purge includes tasks that the Archive Workflow Tasks scheduled process has archived.

**Related Topics**
- Submitting Scheduled Processes and Process Sets: Procedure

### Roles for Workflow Administration Access: Explained

Predefined roles provide access to workflow administration functionality. Users with these roles can, for example, set up approval rules and manage submitted approval tasks. This table identifies the predefined Oracle Business Process Management (BPM) role for sales workflow administration access, and the predefined job roles that inherit it. It also shows the BPM role that provides workflow administration access for all product families. You can assign a predefined BPM role to a custom job role, if required.

<table>
<thead>
<tr>
<th>Product Family</th>
<th>Role Name and Code</th>
<th>Inherited by Job Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>BPM Workflow Customer Relationship Management Administrator</td>
<td>Corporate Marketing Manager (ORA_MKT_CORPORATE_MARKETING_MANAGER_JOB)</td>
</tr>
<tr>
<td></td>
<td>BPMWorkflowCRMAdmin</td>
<td>Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Marketing Analyst (ORA_MKT_MARKETING_ANALYST_JOB)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Marketing Manager (ORA_MKT_MARKETING_MANAGER_JOB)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Marketing Operations Manager (ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Marketing VP (ORA_MKT_MARKETING_VP_JOB)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sales Lead Qualifier (ORA_MKL SALES LEAD QUALIFIER_JOB)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>All</th>
<th>BPM Workflow All Domains Administrator Role</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>BPMWorkflowAllDomainsAdmin</td>
</tr>
</tbody>
</table>

This role isn't assigned to any predefined job role, but you can add it to custom job roles.
Attachments

Attachments: Explained

You can use attachments to provide supplementary information to specific business objects. Attachments can be URLs, desktop files, text, or repository folders. For a business object you may view, create, delete, or edit attachments, depending on your role and granted privileges. For more information on attachments, see the Oracle Fusion Applications Developer’s Guide.

Repository

Attachments are stored in a content management repository provided by Oracle WebCenter Content Server. Users managing attachments can’t interact with the repository unless the repository mode is enabled. When enabled, users can share attachments among objects, update attachments, and perform other tasks. Access to the attachment files is controlled by a digital signing mechanism.

Security

Data security applicable to a specific business object also applies to its attachments. For example, if a user has no access to a specific expense report, then that user cannot access its attachments. You can also use attachment categories to control access and actions on attachments, based on roles associated with that category. For more information on securing attachments, see the Oracle Fusion Applications Developer’s Guide.

Related Topics

- Attachment Entities: Explained
- What’s an attachment category

What is the size limit for attachment files in the sales applications?

By default, the file size limit for an individual, attached file is 100 MB. You can decrease this limit, but you can’t increase it. The method for decreasing the limit varies by object.

Objects with a 100 MB limit for each attachment file are:

- Account
- Activity
- Campaign
- Contact
- Forecasting
- Household
- Lead
- Note
- Opportunity
- Partner
Attachments Troubleshooting: Explained

Attachments UIs are very user-friendly and easy to work with. You may encounter issues in certain cases such as you modify the attachments, for example create additional attachment categories, or implement data security on them.

Issue: Can't View, Add, Update, or Delete Attachments

You may encounter the following issues when trying to view attachments or perform actions such as adding attachments.

- You can no longer see specific attachments that were earlier visible.
- You can no longer update or delete attachments.
- You get an error stating that you do not have permission to add attachments.

Resolution

Use the Manage Attachment Entities page to ensure that attachment categories are associated to the relevant attachment entity. You might need to check with your system administrator or help desk to determine the exact entity used on the page with the expenses attachments or what categories to assign.

If data security is implemented on the categories for the attachment entity, verify that the Enable Security check box is selected in the Manage Attachment Entities page for that entity. Also, make sure that users have a role that has the necessary privileges. The following table lists the privileges required to view, add, update, or delete attachments with a specific attachment category.

<table>
<thead>
<tr>
<th>Action</th>
<th>Privilege</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Read Application Attachment (FND_READ_APPLICATION_ATTACHMENT_DATA)</td>
</tr>
<tr>
<td>Add or Update</td>
<td>Update Application Attachment (FND_UPDATE_APPLICATION_ATTACHMENT_DATA)</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete Application Attachment (FND_DELETE_APPLICATION_ATTACHMENT_DATA)</td>
</tr>
</tbody>
</table>

For example, if users have the Read Application Attachment privilege for all categories associated with the expense report attachment entity, except the Receipts attachment category, then they can view all expense report attachments except those created with the Receipts category. Likewise, if users do not have the Update Application Attachment privilege for any attachment categories tied to the expense report attachment entity, then they cannot create any attachments for the expense reports.

For more information on attachment category data security, see the Oracle Fusion Applications Developer's Guide.

Certain attachments UI have predefined restrictions for users on categories. Your developers can also introduce additional filters to determine which document categories are available for a specific page. Check with your developers or help desk.

Issue: Missing Attachment Category

You can view existing attachments but the attachments no longer have an attachment category associated with them.
Resolution
When the attachment was added, at least one category existed for the corresponding attachment entity. Since then, the entity was edited so that it no longer has any assigned categories, so the user cannot see the category associated with that attachment.

Use the Manage Attachment Entities page to reassign attachment categories to the relevant attachment entity. For example, if users can no longer see the Receipts attachment category for an attachment to an expense report, then search for the expense report attachment entity and assign to it the Receipts category. You may need to check with your system administrator or help desk to determine the exact entity used on the page with the expenses attachments or any additional categories to assign.

Certain attachments UI have predefined restrictions for users on categories. Your developers can also introduce additional filters to determine which document categories are available for a specific page. Check with your developers or help desk.

Related Topics
- Attachment Entities: Explained
- Attachment Entities and Attachment Categories: How They Work Together
- What’s an attachment category

Calendar

Creating the Accounting Calendar

The accounting calendar defines the time periods used in the applications. When you create the calendar, you specify the exact dates for each period. These defined periods, often called enterprise periods, are used for many purposes in the applications. 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

Typically, you create a single accounting calendar as part of your implementation. Setting up your accounting calendar requires the following steps, all of which are covered in this topic:

1. Plan your calendar periods and start year. Refer to the Implementation Considerations section for more information.
2. Create the first-year calendar periods and generate the periods for each additional year. Refer to the Creating the Calendar section for more information.
3. Set the accounting calendar profile option. Refer to the Setting the Calendar Profile Option section for more information.
4. Run a scheduled process. Refer to the Running the Time Dimension Process section for more information.

Note that after your calendar is in use, you cannot change the calendar options. For example, after you have generated forecasts, you can’t change the calendar options.

Implementation Considerations
Since you cannot change the calendar after it’s in use, you should plan which periods your calendar will use, and decide which year you want the calendar to start. 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 your reports and activities can be for each year, but can’t be broken 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 per month varies. In terms of the first year to use for your calendar, consider setting the date to the first date that your company was created. Then you can upload historical data later, if necessary.

Creating the Calendar

When you create the accounting calendar, you are establishing the exact start and end dates for each period, for each year. The following procedure uses the use case from the fictitious Vision Corporation to guide you through the steps.

1. Sign in as a setup user.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Company Profile
   - Task: Manage Accounting Calendars
3. On the Manage Accounting Calendars page, click Create.
4. The Create Accounting Calendar: Calendar Options page:
   a. Name your calendar, for example, Sales Calendar.
   b. Leave the Adjusting Period Frequency set to None.
   c. For Start Date, Vision Corporation uses 1/1/10.
   d. For Period Frequency, select the shortest time period you want to use for reports and activities. Vision Corporation is using 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.
   e. Vision Corporation selects None for the Separator.
   f. Select the Format to use for period names.
5. Click Next. The Create Accounting Calendar: Period Details page appears, showing the generated periods. The image shows multiple columns, including:
   a. Period name, which is month name, one for each month of the year
   b. Year, which is 2010
   c. Period number, one for each month
   d. Quarter number for each period, assuming four quarters in the year
   e. Start and end dates for the periods
   f. A check box used to indicate whether a period is an adjusting period
The following figure shows an example of the Create Accounting Calendar: Period Details page.

6. If needed, manually change the details for each period.

7. Click **Save and Close**.

8. Now you need to generate the periods for each additional year, including the current, or coming year. Open the calendar.

9. Click **Add Year**.

10. Click **Save and Close**.

11. Repeat the last three steps for each year you want to add.

12. Click **Done**.

**Note:** You cannot change your calendar options after you start using the calendar, such as by generating forecasts.

### Setting the Calendar Profile Option

After your calendar is created, you next set the accounting calendar profile option. This profile option setting tells the applications which calendar to use. Use the following procedure:

1. Sign in as a setup user.

2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Company Profile
3. Select the Accounting Calendar Default profile option.
4. In the Profile Values table, click New.
5. For Profile Value, select Site.
6. Click the Profile Value list, and select the name of the calendar you created.
7. Click Save and Close.

Running the Time Dimension Process
You must run the Refresh Denormalized Time Dimension Table for BI process to make calendar time periods available for analytics and reports. Use the following procedure.

1. Sign in as the sales administrator or as a setup user.
2. Click Navigator > Scheduled Processes.
   The Scheduled Processes page appears.
4. In the Schedule New Process dialog box, click the menu next to the Name field and click Search.
5. In the Search dialog box, enter Refresh, and click Search.
6. Select the Refresh Denormalized Time Dimension Table for BI process in the results that are returned and click OK.
7. Click Ok again, if needed.
   The Process Details window appears.
8. In the Process Details window, click Submit.

Related Topics
- Defining Accounting Calendars: Critical Choices

Click to Edit

Click to Edit: Overview
The click-to-edit feature lets salespeople edit records directly from landing pages of work areas. By simplifying data entry, the click-to-edit feature improves usability and efficiency when working with business transactions. Salespeople can change attributes for records directly in the landing pages without navigating to the edit pages. This feature is enabled through the Click-to-Edit on Landing Page Enabled (ZBS_ENABLE_CLICK_TO_EDIT) profile option.

This profile option is not enabled by default. Administrators must set the profile option to enable the click-to-edit feature on the landing pages for the following sales objects:

- Accounts
- Contacts
- Opportunities
- Leads
- Activities
Enabling Click to Edit

Administrators enable the click-to-edit feature by setting the Click-to-Edit on Landing Page Enabled (ZBS_ENABLE_CLICK_TO_EDIT) profile option. This profile option is not enabled by default.

The click-to-edit feature is available from the Accounts, Contacts, Opportunities, Leads, Activities, and Assets landing pages. The feature is also supported for custom objects.

Use the following procedure to enable click-to-edit functionality on the landing pages of supported sales objects:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values
2. In the search region of the Manage Administrator Profile Values page, enter the profile option code name ZBS_ENABLE_CLICK_TO_EDIT in the Profile Option Code field.
3. Click Search.
4. In the list that is returned, click on the profile option code link.
5. Set the profile option value as needed.
6. Click Save and Close.

Related Topics
- Accessing Tasks to Update Existing Setup Data: Procedure

Geographies

Setting Up Geography Data: Overview

If your sales territories are going to use the geography dimension or you want salespeople to be able to validate addresses, then you must set up geography data in your implementation. Set up geography data before creating territories or setting up customer data.

To define geographies, you must:

- Define the geography structure and hierarchy for a country: A geography structure is a hierarchical grouping of geography types for a country. Geography hierarchy is a data model that lets you establish conceptual parent-child relationships between geographies. The applications use the geography structure and hierarchy data to verify addresses, create territories, and define forecasting.
- Define the geography validations for a country: Geography validation determines the geography mapping and validation for a country’s address styles, as well as the overall geography validation control for a country. You must enable validation at the level of granularity you need for your territories.
You can define the geography structure and hierarchy either manually or by importing them from a file. For more information about setting up and importing geographies, see the relevant chapters in the following guides:

- Getting Started with Your Sales Implementation guide
- Implementing Customer Data Management guide
- Understanding File-Based Data Import and Export guide

**Related Topics**
- Getting Started with Your Sales Implementation
- Understanding File-Based Data Import and Export
- Implementing Customer Data Management

**Help**

**Setting Up Help: Overview**

Applications Help and help windows work without you having to set anything up. You can do the optional setup, mainly if you want to create and edit help. Enable the help features you want, perform tasks in the Application Extensions functional area, and create and edit help content.

**Help Features**

In the Offerings work area, enable help features at the offering level. The features determine:

- What's available in Applications Help
- What you can configure to set up help

The first feature for help is Local Installation of Help, and you must leave it selected. Other features are:

- Access to Internet-Based Help Features
- Help Content Management
- Security for Added Help

**Help Configuration Tasks**

In the Setup and Maintenance work area, use these tasks in the Application Extensions functional area to set up help for all users:

- **Set Help Options:**
  - Determine if certain aspects of Applications Help are available to users.
  - Control how aspects of Applications Help work.
  - Determine if icons for help windows are shown by default on the pages where they’re available.

- **Assign Help Text Administration Duty:** Contact your security administrator to determine who can create and edit help.
• **Manage Help Security Groups:** Set up security to limit access to certain help files.

### Help Content

After you set up help, you can review the predefined help and see if you want to add or edit any content. You can also modify help text that appears on the page, for example hints.

**Related Topics**

- Help Files Management: Overview
- How can the icons for help windows be shown by default
- Managing Help That Appears on the Page: Overview

### Help Configuration

**Who can create, edit, and manage help?**

Users with the Manage Help Content (ATK_CUSTOMIZE_HELP_TOPICS_PRIV) privilege can create and edit:

- Help in Applications Help and help windows
- Pages in the Getting Started work area

This privilege is assigned by default to the administrators for product families. Your security administrator can define which users have job roles with this privilege.

**Setting Up Access to Websites from Applications Help: Explained**

You can determine the websites that users can access from Applications Help. Enable the features that make this access possible, and select the websites to make available to users.

**Enabling Features**

In the Offerings work area:

- Leave the Local Installation of Help feature enabled at the offering level.
- Enable the Access to Internet-Based Help Features feature at the offering level to allow access to websites from Applications Help. For example, some help files link to guides on the Oracle Help Center; this access is necessary for those links to work.

**Selecting Websites**

In the Setup and Maintenance work area, use the following:

- Functional Area: Application Extensions
- Task: Set Help Options

In the Web Sites Available from Help Site section on the Set Help Options page, select the sites to link to. These links would appear in the Navigator menu in Applications Help.

**Related Topics**

- Configuring Offerings: Procedure
• Accessing Tasks to Update Existing Setup Data: Procedure

Setting Up for Creating and Editing Help: Procedure
Users with the appropriate roles can edit predefined help or add their own files to help. To enable and set up for creating and editing help, do the following in the specified order.

Enabling Features
In the Offerings work area, configure the following features at the offering level.

• Leave the Local Installation of Help feature enabled.
• Enable the Help Content Management feature.
• Enable the Security for Added Help feature if you want certain help files to be available only to a restricted set of users.

⚠️ Caution: Don’t enable this feature if you don’t have this requirement, because the feature can affect performance.

Setting Help Options
Optionally set any of the following help options according to your requirements:

1. In the Setup and Maintenance work area, go to the following:
   - Functional Area: Application Extensions
   - Task: Set Help Options
2. On the Set Help Options page, in the Help Site Appearance section, provide a source name and image used to identify files in Applications Help that were added or edited.
3. In the Oracle User Productivity Kit section, add a link from the Navigator in Applications Help to your User Productivity Kit library.
4. In the Privacy Statement section, add a link to your own privacy statement. To see this link, users click their user name in the global header of Applications Help.

Providing Users Access to Create and Edit Help
Only users with job roles containing the Manage Help Content (ATK_CUSTOMIZE_HELP_TOPICS_PRIV) privilege can create and edit help. The Assign Help Text Administration Duty task is a reminder for you to follow up with your security administrator. Make sure that users who want to create and edit help have the access to do so.

Setting Up Help File Security
If you enabled the Security for Added Help feature, then use the Manage Help Security Groups task in the Setup and Maintenance work area. Select job roles to include in help security groups. When you or other users then create or edit a help file, they can select a group to determine which job roles have access to the file.

Related Topics
• When do I link to the Oracle User Productivity Kit library from Applications Help
• Creating Help Security Groups: Worked Example
• Configuring Offerings: Procedure
• Accessing Tasks to Update Existing Setup Data: Procedure
Why can’t I see certain sections on the Set Help Options page?

What’s available on the page depends on the help features that you enable in the Offerings work area. This table describes the correlation between features and specific sections on the Set Help Options page.

<table>
<thead>
<tr>
<th>Help Feature</th>
<th>Section on Set Help Options Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Installation of Help</td>
<td>None, but without enabling this feature, you can’t enable the other help features</td>
</tr>
<tr>
<td>Access to Internet-Based Help Features</td>
<td>Web Sites Available from Help Site</td>
</tr>
<tr>
<td>Help Content Management</td>
<td>Help Site Appearance</td>
</tr>
<tr>
<td></td>
<td>Oracle User Productivity Kit</td>
</tr>
<tr>
<td></td>
<td>Privacy Statement</td>
</tr>
<tr>
<td>Security for Added Help</td>
<td>None</td>
</tr>
</tbody>
</table>

Lightbox Content Library

Setting Up Sales Lightbox: Points to Consider

Sales Lightbox is a content library that you can use to store, access, and share files, such as slide decks, web-based content, images, and .pdfs. Lightbox lets users store, access, and share content with individuals, accounts, and opportunities.

You can find more information about Lightbox end user tasks and capabilities in the online help and in the Using Sales guide.

Supported File Types

Sales Lightbox supports the following file types:

- Microsoft Powerpoint (.pptx): If you install the Microsoft Office Compatibility Pack, and save a presentation in the Open XML format (.pptx 2007), then those presentations are fully compatible with Sales Lightbox.
- Portable Document Format (.pdf): Standard .pdf files are supported.
- HTML: HTML in the form of microsites: See the topic, Using Microsites in the Lightbox Content Library, for more information.
- .jpg and .png: Image files in the .jpg and .png formats are supported.

For information about the actions that can be performed on different content types, see the topic, Available Lightbox Actions for Different Content Types.

Upload File Size

The maximum file size for a presentation to be uploaded is 100 MB.
Salespeople Access
Salespeople can access Sales Lightbox without any setups required. All of the default sales user roles (for example, Sales Representative, Sales Manager, and Sales VP) can access the feature using the Sales > Lightbox menu. In addition, the Sales Administrator user has all of the same permissions that sales users do. For additional details on sales user tasks for Sales Lightbox, see the Using Sales guide.

Lightbox Administrator Access
In addition to the sales user permissions, the supplied Application Implementation Consultant (a type of setup user) and Customer Relationship Management Application Administrator job roles have additional privileges to:

- Access the All Content view: This view lets the administrator see all content in the application, not just his own. Sales users cannot see this view.
- Delete content: Only the administrator can delete content not owned by him.

Related Topics
- Sales Lightbox: Overview
- Using Microsites in the Lightbox Content Library

Mass Update of Records

Enabling Mass Update of Records
Salespeople can update fields on multiple records at once using the mass update feature. For example, a salesperson can update the sales stage on multiple opportunities at the same time. As an administrator, you use Application Composer to enable the feature.

Both standard and company-defined business objects support mass update. In addition to enabling the feature, you can configure which fields users can update. You can also set optional profile options to control how many records your users can update at once.

Supported Objects
In addition to any company-defined objects you create, the following standard business objects support the mass update feature:

- Activities
- Accounts
- Assets
- Contacts
- Leads
- Opportunities

Enabling the Update Action
Salespeople access the mass update feature from the application landing pages by clicking the Update action. Before sales users can access the feature, you must first display the Update action on the object’s landing page (sometimes referred to
as an overview page, list page, or listing). You must manually display the Update action for each object’s landing page where you want to enable the feature.

To display the **Update** action on a landing page:

1. Sign in as the sales administrator or as a setup user.
2. Ensure that you are working in an active sandbox.
3. Click **Navigator > Configuration > Application Composer**.
4. In the navigation tree, expand **Standard Objects**, and then expand the object you want to modify. For example, expand the **Opportunity** object.
5. Within the object you’re modifying, click the **Pages** node.
6. Ensure that the **Simplified Pages** tab is selected.
7. In the Landing Page Layouts region, select the standard landing page layout, and then click the duplicate layout icon to duplicate and edit the resulting copy. Alternatively, you can edit an existing, company-defined layout. The Landing Page Layouts region is the list overview page for the object you’re modifying.
8. Edit the new layout. For example, to edit the Opportunities landing page, click the edit (pencil) icon on the Fuse Opportunity Overview Table. In edit mode, the Landing Page Layout page template displays different regions for the areas of the landing page that you can configure.
9. Navigate to the Configure Detail Form: Buttons and Actions region.
10. In the Available Actions window, double-click the **Update** action to move it to the Selected Actions window. Or, use the arrows to move the items that you want to make available.
11. Click **Save and Close**, then **Done**.
12. Test the changes using the steps in the Testing the Changes section later in this topic.
13. Publish the sandbox.

### Selecting Mass Update Fields

Each of the applications has a default set of fields that can be updated as part of the mass update feature. These fields are described in the Using Sales guide. You can configure this list to include other standard fields, or even company-defined fields. If you want to enable the mass update feature for company-defined objects, then you must configure the list of fields that can be updated by users. You configure the list of mass update fields using the same company-defined landing page layout where you manually displayed the Update action.

**Note:** You can configure different landing page layouts to display under different conditions. This means that you can change the set of fields available for mass update, depending on the role of the user who is viewing the page.

To select which fields are available for the mass update feature:

1. Edit the same landing page layout where you manually displayed the Update action. Refer to the Enabling the Update Action procedure in this topic for steps.
    
    After you display the Update action, the Configure Mass Update Fields region displays.
2. Navigate to the Configure Mass Update Fields region.
3. In the Available Fields box, double-click the fields that you want to make available for the mass update feature at runtime. Or, use the arrows to move the items that you want to make available.
    
    The list of available fields includes both standard and company-defined fields. Read-only fields, such as formula fields, and fields that can be conditionally updated, are not included in this list.
    
    For standard objects, the list of selected fields is preconfigured, but you can add or remove fields as needed.
4. Click **Save and Close**, then **Done**.
5. If you want users with different roles to see a different set of fields when they click the Update action, then create multiple company-defined landing page layouts. For each landing page layout, you must:
   a. Manually display the Update action.
   b. Configure a different set of mass update fields in each landing page layout that is intended for each role.
   c. Assign a different role condition to each layout.

For example, let us say that when viewing a partner opportunity, you don’t want salespeople to see Sales Channel fields. However, channel managers should be able to see and update those fields. To accomplish this scenario, remove the Sales Channel fields from the mass update list on the Sales Representative landing page layout. Then, add the Sales Channel fields to the mass update list on the Channel Manager landing page layout.

Testing the Changes
Before publishing your sandbox, follow your organization’s best practices to test the changes you just made. For example:
1. Sign in as a user who has access to the object you just modified, such as a sales representative or sales manager.
2. Go to the landing page and click the Actions menu to verify that the Update action is available.
3. Review the list of mass update fields to confirm that the list appears as expected.

Once you have confirmed this change, you can publish the sandbox to roll out the change to your users.

Threshold Profile Options
Each of the standard objects that support mass update has a profile option that determines the maximum number of records that users can update at once. Note the following:

- By default, the profile options are set to 25 records.
- If not set, then the application sets the number of records that can be updated at once to 10.
- The maximum number of records that can be updated at once is 500.
- For company-defined objects, the threshold value is set at 25 and cannot be changed using a profile option.

The following table lists the mass update threshold profile options for each of the supported standard objects and any company-defined objects. The profile option codes are listed in parentheses. Use the Sales Foundation functional area and the Manage Administrator Profile Values task in Setup and Maintenance to access the profile options.

<table>
<thead>
<tr>
<th>Application</th>
<th>Profile Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activities</td>
<td>Activity Mass Update Threshold Value (ZMM_MASS_UPDATE_THRESHOLD)</td>
</tr>
<tr>
<td>Accounts</td>
<td>Mass Update Threshold Value (ZBS_MASS_UPDATE_THRESHOLD)</td>
</tr>
<tr>
<td>Assets</td>
<td>Mass Update Threshold Value (ZBS_MASS_UPDATE_THRESHOLD)</td>
</tr>
<tr>
<td>Contacts</td>
<td>Mass Update Threshold Value (ZBS_MASS_UPDATE_THRESHOLD)</td>
</tr>
<tr>
<td>Leads</td>
<td>Mass Update Threshold Value (ZBS_MASS_UPDATE_THRESHOLD)</td>
</tr>
<tr>
<td>Opportunities</td>
<td>Mass Update Threshold Value (ZBS_MASS_UPDATE_THRESHOLD)</td>
</tr>
<tr>
<td>Company-defined objects</td>
<td>Mass Update Threshold Value (ZBS_MASS_UPDATE_THRESHOLD)</td>
</tr>
</tbody>
</table>
Setting the Profile Options
To modify the profile option settings:

1. Sign in as the sales administrator.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values
3. In the search region of the Manage Administrator Profile Values page, enter the profile option name in the Profile Display Name field. Or, enter the code in the Profile Option Code field.
4. Click Search.
5. In the list that is returned, click the profile option name link.
6. Set the profile option value as needed.
7. Save your changes.

Related Topics
- Applying Mass Update to Leads
- Applying Mass Update to Accounts and Contacts
- Applying Mass Update to Opportunities
- Applying Mass Update to Activities
- Applying Mass Update to Assets

Messages
Messages: Explained
Messages provide users with information about business or application errors or warnings.

Typically, messages inform the users about the following:
- Missing or incorrect data
- Status of an application, page, or a business object
- Status of an ongoing process
- Result of a user action

Besides notifying users about the problem, messages provide guidance to users on taking corrective action. Messages also warn users about the consequences of a certain action.

Oracle provides a set of predefined messages that are stored in a message dictionary. You can create additional messages or modify the existing ones using the Manage Messages task in the Setup and Maintenance work area.

Note: Don’t delete predefined messages unless you are sure that they aren’t used anywhere.
Message Dictionary

The message dictionary stores messages that the application requires at run time. Messages are predefined for specific applications and modules, but a few are common messages that can be used in any application or module.

When you create messages, use the message text and the following components to cover additional details addressing users and help desk personnel:

- User Details: A detailed explanation of the message short text meant for users.
- Administrator Details: Details of the identified problem meant for the help desk personnel. The end users don’t see this text.
- Cause: An end-user version of the cause of error.
- User Action: Instructions to users for addressing the identified problem. Where there is no guidance for end users, they must approach the help desk.
- Administrator Action: Corrective action that help desk personnel must take to correct the problem. This information is not available to the end users.

Related Topics

- Message Types: Explained
- Creating and Editing a Message: Procedure

Common Messages: Points to Consider

Message names that begin with FND_CMN are common messages. Each common message can appear in multiple places in any product family across Oracle Applications Cloud. For example, the FND_CMN_NEW_SRCH message can be used for any search to indicate that no results were found. Common messages of type error or warning are part of the message dictionary.

Creating and Editing Common Messages

You can create common messages for use in multiple places. However, ensure that you follow the predefined naming convention and numbering series associated with the application or module.

Note: Don’t use FND_CMN as the prefix for the messages you create because all the predefined common messages begin with it.

Common messages can be used in any application. Therefore, consider the ramifications if you edit any aspect of the message, including incident and logging settings. Changes would be reflected in all instances where the message is used. For example, if you change the message text, ensure that the text is generic and applies to the entire site of Oracle Applications Cloud implementation.
Understanding Default Navigation Components

Sales users, such as sales representatives and sales managers, access the sales application work areas to perform their daily tasks. After signing in, they land on the home page and use the springboard or global header icons to access other areas of the application.

Unified Home Page

The home page provides unified access to both desktop and simplified interfaces. The home page lets users quickly pick from the available icon groups and then navigate to a work area to perform their tasks. A single click on the Home icon or the logo quickly returns users back to the home page with its springboard and infolets.

Springboard

The grid of icons on the home page is called the springboard. The springboard is also available as a strip above simplified pages. Sales end users click the springboard icons to open the work areas and dashboards used in their main tasks. If a user has access to more than 16 work areas, the application will automatically group the work areas under a parent icon (or folder).

The following table describes the default application behavior for grouping work areas within springboard icons. This behavior applies to all sales user roles.

<table>
<thead>
<tr>
<th>User Access</th>
<th>Icon Display</th>
</tr>
</thead>
<tbody>
<tr>
<td>User has access to only one page entry/work area within a specific folder</td>
<td>The icon for the page entry/work area is displayed at the top level. For example, a sales representative with access to only leads, sees just the Leads icon at the top level on the home page.</td>
</tr>
<tr>
<td>User has access to multiple page entries, up to 16</td>
<td>All page entry icons display at the top level.</td>
</tr>
<tr>
<td>User has access to more than 16 page entries</td>
<td>Page entries are grouped under a parent icon/ folder (for example, the Sales icon containing work areas for accounts, opportunities, and leads).</td>
</tr>
<tr>
<td>User has access to 15 or fewer page entries outside the Tools folder</td>
<td>These icons appear at the top level, and only the icons under Tools remain in a folder.</td>
</tr>
</tbody>
</table>

Navigator

The Navigator is the main menu, found in the global header. Users access the Navigator to get to their work areas and dashboards. Note that the Navigator might have more page entries than the springboard.

Configuring the Springboard and Navigator

You can modify the springboard and Navigator using the Structure tool available to setup users. For example, you can:

- Specify whether certain Navigator menu items, springboard, and home page features display.
- Modify the structure, grouping, and ordering of the navigation menu items and the springboard icons.
To understand how to configure the springboard and home page to fit your unique business needs, see the following guides:

- Extending Sales
- Oracle Applications Cloud Configuring and Extending Applications

### Global Header

The global header is the area across the top of the UI. It is persistent across pages for all users. By default, the global header icons and links let users access:

- **Home**: Returns the user to the default home/landing page.
- **User settings and actions**: Among other actions, users can access personalization features, user preferences, and configuration tools (if allowed) by clicking on their user image or name in the global header.
- **Global search**: If enabled, users can search key fields in multiple objects across the cloud service.
- **User assistance**: Lets users toggle the page-level and region-level help icons on or off.
- **Favorites and Recent items**: Users can access links to pages that they have bookmarked or have opened recently.
- **Watchlist**: Users can access a list of transaction-related items that pertain to them.
- **Notifications**: Contains a user’s appointment and task notifications.

You can modify the global header template. For more information, see the topics on modifying the global page template in the Oracle Applications Cloud Configuring and Extending Applications guide.

### Infolets

Infolets are configurable information portals on the UI that provide report summaries based on sales users’ transactional sales data. Infolets, when available, show up as a row of dots on the home page, above the springboard. The following figure shows an example of the pagination controls for infolets.

You can create new infolets, and add or remove them as needed. For more information, see the Creating and Administering Analytics for Sales guide.

### Related Topics

- Signing In and Getting Started: Explained
- Configuring Navigation and Home Page: Overview
- Defining Home Page Display Settings: Procedure
- What do I do if I can't see springboard icons or Navigator menu items I expect

### Notes

### Defining Notes: Points to Consider

A note is a record attached to a business object. Notes capture nonstandard information received as you do business. When setting up notes for your application, you should consider the following points:

- Which new note types you want to add.
- How you want to map these new note types to business objects in your area.
Note Types

Note types are assigned to notes when they’re created, to categorize them for future reference. During setup you can add new note types, and use a process called note type mapping to restrict them by business object type. When deciding which new note types you want to add, keep in mind how you want your users to search for, filter, and report on these notes.

Note Type Mappings

If you add new note types, you must map them to the business objects you use in your product area. Here are some points to consider when mapping note types:

- When you select a business object other than Default Note Types, you only see the note types that apply to that object.
- If no other note types appear, then note type mapping doesn’t exist for that object and the default note types are used. Select Default Note Types to see which default note types exist in the application.
- If you modify a default note type, it affects all the business objects that don’t have a note type mapping.

Suppose you decide to add a new note type of Analysis for your product area of Sales-Opportunity Management. You use note type mapping to map Analysis to the Opportunity business object. Now, every time you create or edit a note for an opportunity, you see Analysis as an available note type option.

When deciding which note types to map to business objects, you should keep the same considerations in mind that you did when you decided which note types to include.

Related Topics

- Extending Your Applications: How It Works

Privacy

How can I enable the privacy statement?

In the Setup and Maintenance work area, use the following:

- Functional Area: Application Extensions
- Task: Manage Applications Core Administrator Profile Values

Search for the Privacy Statement URL profile option. In the profile values section, update the Profile Value text box with the full URL of the web page containing the privacy content.

In the global header, click your user name or image and from the Settings and Actions menu, select About This Page. Click Privacy Statement to view the linked web page.

Public Unique IDs
Public Unique IDs: Explained

Using document sequencing, the application generates a unique number (or ID) for each business object record when the record is created in the database. Sales users cannot easily read or use unique IDs because of their length and complexity. As an administrator, you can configure the unique ID that’s generated, to make it more user-friendly and readable. This user-friendly value is called the public unique ID.

The following objects support public unique identifier (PUID) for data model, unique sequence generation using the advanced setup, global search by PUID attribute, list of objects where the PUID attribute is exposed, and pickers by PUID attribute:

- Account
- Contact
- Custom Objects
- Opportunities
- Sales Leads
- Partner

The following sales objects support PUIDs:

<table>
<thead>
<tr>
<th>Top-Level Object Name</th>
<th>Model Support (PUID Attribute Name)</th>
<th>Object PUID Generation</th>
<th>Global Search By PUID</th>
<th>PUID Exposed in List Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>PartyNumber (RegistryID)</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Contact</td>
<td>PartyNumber (RegistryID)</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Custom Objects</td>
<td>Custom Attribute</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Sales Lead</td>
<td>Lead_Number</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Opportunity</td>
<td>Opty_Number</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Activities</td>
<td>Activity_Number</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Partner</td>
<td>Company_Number</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
</tbody>
</table>

You have the following options for setup:

- Use the default setup, where no implementation steps are required.
- Use the basic setup, which is configurable to a certain degree. If you use this setup, the default setup is not used.
- Use an advanced setup which is more complex and configurable. The default and basic setup apply to all objects. Advanced setup is on a per-object basis.

The following table shows the setup options and where to find more information about the setup.

<table>
<thead>
<tr>
<th>Setup Option</th>
<th>Description</th>
<th>Where to Find More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Setup</td>
<td>In this setup, no implementation steps are required. The application automatically</td>
<td>No additional documentation, other than this introduction.</td>
</tr>
<tr>
<td>Setup Option</td>
<td>Description</td>
<td>Where to Find More Information</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td>Basic Setup</td>
<td>In this setup, you set two profile options where you configure the radix (or base numbers and characters) and prefix to use. The application generates an alphanumeric public unique ID instead of the default numeric public unique ID for each record.</td>
<td>See the Public Unique ID Basic Setup section in this topic.</td>
</tr>
<tr>
<td>Advanced Setup</td>
<td>In this setup, you define a radix and prefix for each object. It is not required for the radix and prefix to be different for each object.</td>
<td>See the Public Unique ID Advanced Setup section in this topic.</td>
</tr>
</tbody>
</table>

**Public Unique ID Basic Setup**

In the basic setup, you can define a single prefix that is shared across all business objects in the implementation. In addition, you have several different radix values that can be used. Together these values form the public unique IDs.

To perform the basic setup, you set two profile options:

- CRM Public Unique ID String Encoding profile option: Controls the characters used in the encoding of the public unique ID based on a radix, or base number.
- CRM Public Unique ID Prefix profile option: Defines the optional prefix value for the public unique ID.

**CRM Public Unique ID String Encoding profile option (ZCA_PUID_RADIX):**

This profile option determines the set of numbers and letters used in creating the public unique ID. The default value is null. After you set the radix, the application converts the public unique ID into user-friendly IDs, using alphanumeric characters instead of numeric digits.

The following base values are available:

- Numbers 0-9, letters A-F
- Letters A-Z, upper case
- Numbers 2-9, letters BCDFGHJKLMNPQRSTUVWXYZ
- Numbers 0-9, letters ABCDEFGHJKLMNPQRTUWXY
- Numbers 0-9, letters A-Z, upper case
- Numbers 0-9, letters A-Z, letters a-z
- No alphanumeric conversion

The values for the radix are stored in the lookup type, ZCA_PUID_ENCODING. This lookup type is accessible using the Manage Standard Lookups task in Setup and Maintenance.

**CRM Public Unique ID Prefix profile option (ZCA_PUID_PREFIX):**

In this profile option, you optionally define the prefix for the public unique ID at the site level. After you set this profile option to the prefix you want, application inserts the prefix before the public unique ID base encoded document sequence value. For example, you may want the records for the pharmaceutical divisions of your company to be denoted with public unique IDs and the prefix Pharma or Pharma1, Pharma2, and so on. By default, the prefix has no value.
Keep the following points in mind:

- If you enter a prefix value, then you must set a radix value. The length of a prefix value is 5. You cannot use the prefix setting by itself.
- If you require a delimiter, then include it as part of the prefix.
- The concatenated public unique ID and prefix must not exceed the defined field length, which is usually 30 characters.

Use the following procedure to set the profile options.

1. Sign in as a setup user.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Public Unique Identifier Profile Options
3. On the Manage Public Unique Identifier Profile Options page, click the ZCA_PUID_RADIX option.
4. In the ZCA_PUID_RADIX: Profile Values section of the page, click the Profile Option Values list of values and select the base numbering value.
5. Click **Save and Close**.
6. Optionally, click the ZCA_PUID_PREFIX option.
7. In the ZCA_PUID_PREFIX: Profile Values section of the page, in the Profile Value box, enter the prefix and the delimiter you want, if any. For example, enter `CDRM_`.
8. Click **Save and Close**.

Public Unique ID Advanced Setup

In the advanced setup, you can define a different prefix and numbering radix for each object.

Keep the following points in mind:

- If you enter a prefix value, you must set a radix value. You cannot use the prefix setting by itself. The length of a prefix value is 5.
- If you require a delimiter, then include it as part of the prefix.
- The concatenated public unique ID and prefix must not exceed the defined field length, which is usually 30 characters.

Use the following procedure to configure the radix and optionally, the prefix in the advanced setup.

1. Sign in as a setup user.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Public Unique Identifier Sequence Generation
3. On the Manage Public Unique Identifier Sequence Generation page, if you’re configuring these values for the first time, add a row to the table.
4. In the Object list of values, select the object for which you are configuring the public unique ID.
5. In the Radix list of values, select the base numbering to use. This list of possible radix values is the same list of values that are provided in the ZCA_PUID_RADIX profile option.
6. In the Prefix box, enter the prefix you want to use for the object and unique ID.
   - Enter a maximum of five characters.
7. Repeat for other objects.
8. Click Save and Close.

The following table lists options for RADIX in the Manage Public Unique Identifier Sequence Generation task. For example, the sequence will look as follows if a Lead Number is in the format of "LeadNumber":

- "CDRM_2452" if the Advance Setup for Lead object is not setup.
- If the Advance Setup for Lead object is setup, then the LeadNumber is created in the form of "LeadNumber" = "LEAD_106065",
- PREFIX is LEAD_ and RADIX is "106065" which is in the format of "No Alphanumeric Conversion".
- RADIX is in the format of "Letters A-Z, Upper Case", "LeadNumber": "LEAD_GAXM",

<table>
<thead>
<tr>
<th>Prefix</th>
<th>Radix</th>
</tr>
</thead>
<tbody>
<tr>
<td>NULL</td>
<td>NULL</td>
</tr>
<tr>
<td>NULL</td>
<td>Numbers 0-9, letters A-F</td>
</tr>
<tr>
<td>NULL</td>
<td>Numbers 0-9, letters A-F</td>
</tr>
<tr>
<td>A-</td>
<td>Numbers 0-9, letters A-F</td>
</tr>
<tr>
<td>A-</td>
<td>Numbers 0-9, letters A-F</td>
</tr>
<tr>
<td>Null</td>
<td>No alphanumeric conversion</td>
</tr>
<tr>
<td>A-</td>
<td>Numbers 0-9, letters A-Z, letters a-z</td>
</tr>
<tr>
<td>A-</td>
<td>Numbers 0-9, letters A-Z upper case</td>
</tr>
<tr>
<td>A-</td>
<td>Numbers 0-9, letters ABCDEFGHJKLMNPQRSTUVWXYZ</td>
</tr>
<tr>
<td>A-</td>
<td>Numbers 2-9, letters BCDFGHJKLMNPQRSTUVWXYZ</td>
</tr>
<tr>
<td>A-</td>
<td>Letters A-Z, Upper Case</td>
</tr>
<tr>
<td>A-</td>
<td>Numbers 0-9, letters A-F</td>
</tr>
</tbody>
</table>

**Related Topics**

- [Document Sequences: Explained](#)
- [Document Sequences: Points to Consider](#)
Service Request Management

Setting Up Service Request Management: Overview

Using the Oracle Engagement Cloud service request functionality, sales and service representatives can create and manage service requests. Several tasks are involved in setting up the functionality, as summarized in this topic.

Summary of Features
Service request management lets sales and service professionals:

- Create service requests
- Enter summary information into service requests
- Add products and product groups to service requests
- Organize service requests into queues
- Compose and send messages from service requests
- Add contacts to service requests
- Add team members to service requests
- Automatically or manually assign service requests to other users
- Create activities for service requests
- Share service request information using a social network
- Associate and view items in the knowledge base
- Integrate with the partners application to capture and resolve issues reported by your partner accounts

See the Oracle Engagement Cloud Using Service guide for more information about sales user tasks for service requests.

Summary of Setup Tasks
The following are the high-level setup tasks for service request management:

- Enable the Service offering
- Understand the predefined service request job and duty roles
- Define service request assignment rules
- Enable the sales catalog for service requests
- Enable outbound e-mail messages for service requests
- Configure service request categories
- Configure knowledge base settings for service requests
- Modify service request lookups

See the Oracle Engagement Cloud Implementing Service guide for more information about service requests setup tasks.

Related Topics
- Oracle Engagement Cloud - Using Service guide
Watchlist

Setting Up the Watchlist: Overview

The Watchlist is a portlet that displays a list of a user’s transaction-related items, such as expenses. It’s available using the Watchlist icon in the global header. For all users across the site, you can disable or enable predefined Watchlist categories and items, edit their names, and determine how often item counts refresh.

You cannot delete predefined Watchlist categories and items, nor create any for the site. Users can create their own Watchlist items through saved searches.

You use the Set Watchlist Options task in the Setup and Maintenance work area to access the Watchlist setup page. Note you must sign in as a setup user to configure Watchlist choices.

Disabling Predefined Categories and Items

Use the Set Watchlist Options page to enable or disable predefined Watchlist categories and items. Disabling any category or item also disables associated processes involved in calculating the Watchlist item counts for all users. These processes include creating data caches, performing security checks, launching services across domains, running queries, and so on.

An item with the Predefined type represents the actual predefined Watchlist item that appears in the Watchlist. If you disable this type of Watchlist item, then:

- The item is not available for users to display in their watchlist
- The item is removed from any watchlist where it is currently displayed

A Watchlist item with the user-created saved search type does not appear in the Watchlist; it controls the display of the Manage Watchlist button or menu item in pages with saved searches. If you disable this type of Watchlist item, then:

- The Manage Watchlist option is not available to users in the corresponding work area, so users cannot use their own saved searches as Watchlist items. A message is displayed to users when they try to use this option.
- Any user-defined saved searches from that work area already used as Watchlist items are no longer available in the users’ watchlist. The user-defined saved searches are still available to be used for searching, but not for the Watchlist.

If you disable a Watchlist category, then the category is not available for users to include in their watchlist, and all Watchlist items within the category are also disabled.

Ultimately, the Watchlist for any user contains the subset of categories and items that are enabled in the Set Watchlist Options page:

- Plus any items based on user-defined saved searches
- Minus any categories or items that the user chooses to hide using Watchlist preferences
- Minus any items with no results found, if the user chooses to hide such items using Watchlist preferences

Specifying Refresh Intervals

All Watchlist items have a predefined refresh interval, which controls how often the query that calculates the count for a Watchlist item can be run. Use the Set Watchlist Options page to edit the interval values. What you specify as the refresh
interval for a Watchlist item of type User-created Saved Search applies to all Watchlist items based on saved searches created by users on the corresponding search page.

When the user is in the Welcome dashboard with the Watchlist open for at least two and a half minutes, the query automatically runs for all Watchlist items if no refresh already ran in this user session. To subsequently run the query again, users can manually refresh the Watchlist region. The Refresh icon is enabled after five minutes since the last refresh.

Note: During a refresh, the query runs for an individual Watchlist item only if the time since the last query for this item is equal to or greater than the specified refresh interval. Since the manual refresh of the entire Watchlist is not available until five minutes after the last refresh, you should not set a Watchlist item refresh interval that is less than five minutes.

When users open Watchlist from the global header, a refresh automatically runs if five minutes have passed since the last refresh. During this refresh, the query runs for an individual Watchlist item only if the time since the last query for this item is equal to or greater than the specified refresh interval.

For example, you set the interval to eight minutes for a particular Watchlist item. When the user signs in and goes to the Welcome dashboard, with the Watchlist open, the query automatically runs for this Watchlist item after two and a half minutes. Every two and a half minutes after, a check is performed for stale counts and new cached counts are displayed.

Five minutes after the query ran, the Refresh icon is enabled and the user performs a manual refresh. However, the query does not run for this Watchlist item, because the refresh interval is eight minutes. The user navigates away from the Welcome dashboard and opens the Watchlist from the global header six minutes later. A refresh automatically runs because more than five minutes have passed since the last refresh. This time, the query runs for this Watchlist item because it has been more than eight minutes since the query last ran for this item.

Editing Predefined Category and Item Names

Predefined Watchlist category and item names are stored as meanings of standard lookups. Lookup types for predefined categories end with WATCHLIST, for example EXM_EXPENSES_WATCHLIST. Edit the lookup type meaning to change the category name. To change item names, edit lookup code meanings for that lookup type.

For more information on the Watchlist, see the related topics and then online help.

Related Topics

• Disabling and Enabling Watchlist Categories and Items: Points to Consider

• Refresh Intervals for Watchlist Items: Explained

• Creating Watchlist Items: Procedure

• Displaying and Hiding Watchlist Items: Procedure
6 Setting Up Multiple Business Units

Business Units: Overview

As part of your enterprise structure in the applications, the business unit (BU) primarily serves as a container or construct that can be used to separate or share setup and reference data. A business unit typically performs one or many business functions and has a specific place in the organization hierarchy. Usually, each business unit has a manager, strategic objectives, a level of autonomy, and responsibility for its profit and loss.

A business unit can:

• Process transactions on behalf of many legal entities and post transactions to its own primary ledger.
• Segment transactional data from other business units. For example, if you run your Sales business separately from your Marketing business, you segment the Sales business data to prevent access by the Marketing employees.
• Report on transactions.
• Share sets of reference data across applications. Business units process transactions using reference data sets that reflect your business rules and policies across the company. You can share reference data, such as payment terms and transaction types, across business units, or you can choose to have each business unit manage its own set, depending on the level at which you wish to enforce common policies.

Business Unit Terminology

Be aware of the following terminology as you implement and work with multiple business units:

• Master data: Data that is managed globally and is not specific to any BU. Examples include:
  ○ Accounts: Customer accounts cannot be segmented by BU.
  ○ Users: Users can be associated to BUs through their resource organization membership, but in general are managed globally.
  ○ Products: While different BUs might sell different products, the definition of a product is global.

• Reference data: Data that is used by transactional objects like leads and opportunities. Reference data can be different across BUs or common across BUs. Reference data is organized into reference data sets, also called sets, each with a unique Set ID. Examples include:
  ○ Lookup types, such as those that provide lists of values for several fields in opportunities and leads
  ○ Opportunity sales methods, available for modification in the sales methods setup pages

• Transactional data: Refers to leads, opportunities, and contracts that are created during a typical sales process.

Multiple Business Units in Sales: Overview

Setting up your enterprise structure with multiple business units (BUs) lets you have separate units that can perform different business functions and that can be rolled up into the management hierarchy. In the sales applications, the following business objects support the use of multiple BUs:

• Contracts
Benefits of Using Multiple BUs

Before implementing a multiple-BU model, evaluate whether your implementation can benefit from implementing multiple BUs. This evaluation is, of course, specific to each organization, but some of the considerations include:

- Access customer data across BUs: Realize a complete, single view of your customers and their interactions across all BUs.

  Note: Access to master data, such as accounts and contacts, must be driven through territory-based assignment. Master data cannot be segregated by business unit.

- Global reporting and forecasting: Get enterprise-wide analytics for key stakeholders and executives. Forecasting and pipeline management can be done globally.

- Standardize business processes: Use best practices and standardize sales processes across the enterprise.

- Improve collaboration: Sales teams across BUs can collaborate on deals with the same customer, avoiding conflicts for similar products and improving cross-sell and upsell opportunities.

- Reduce integration costs and data duplication: Fewer integrations are needed between sales and ERP systems, with improved data quality in the sales system.

- Reduce duplicate development: Lower ownership costs for implementation and consulting resources. Avoid duplication of setups and company-defined development artifacts.

- Reduce subscription costs: Users supporting different BUs don’t need to sign on to multiple systems that require separate licenses.

Benefits With Multiple BUs

In the sales applications, depending upon your business needs, structuring your enterprise with multiple BUs can be beneficial within the sales business objects that support multiple BUs.

The following table lists some of the ways your implementation can benefit from using multiple BUs. The concepts in the table are described in the preceding text.

<table>
<thead>
<tr>
<th>Business Object</th>
<th>Usage or Benefit</th>
<th>More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contracts</td>
<td>• You can associate contracts with a BU, allowing them to be restricted by BU. &lt;br&gt; • You can specify some Contract Terms Library components at the BU level. For example, you can enable clause and template adoption at the BU level.</td>
<td>See the topics on setting up business units for the contract terms library in the Implementing Enterprise Contracts guide.</td>
</tr>
<tr>
<td>Leads</td>
<td>• You can associate leads with a BU, allowing transactional data to be restricted by BU. &lt;br&gt; • You can select which assignment rules and assessment templates to use for your leads.</td>
<td>See the topics: &lt;br&gt; • Multiple Business Units in Leads: Overview</td>
</tr>
</tbody>
</table>
### Business Object

<table>
<thead>
<tr>
<th>Business Object</th>
<th>Usage or Benefit</th>
<th>More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business Object</strong></td>
<td><strong>Usage or Benefit</strong></td>
<td><strong>More Information</strong></td>
</tr>
</tbody>
</table>
| | • You can use set-ID-enabled lookups to segregate lookup values by BU. This type of configuration lets you present different lookup values to users in different BUs. | • Specifying Leads Business Unit Properties: Procedure  
• Adding the Business Unit Field in Leads: Procedure |
| Opportunities | • You can associate opportunities with a BU, allowing transactional data to be restricted by BU.  
• You can use set-ID-enabled lookups to segregate lookup values by BU. This type of configuration lets you present different lookup values to users in different BUs.  
• You can set profile options at the BU level, including the close opportunity required fields, default sales method, and territory assignment method.  
• You can associate several opportunity attributes with a set ID, allowing them to be shared across reference data sets. | See the topics:  
• Multiple Business Units in Opportunities: Overview  
• Specifying Opportunity Business Unit Properties: Procedure  
• Adding the Business Unit Field in Opportunities: Procedure |
| Resource Organizations | You can associate sales resources and resource organizations with a BU, thereby limiting the sets of data that the sales resources have access to. | See the topics:  
• Sales Resources and Multiple Business Units in Sales: Overview  
• Associating Resource Organizations With Multiple Business Units: Procedure |
| Territories | You can define the coverage of a sales territory by selecting a BU. Leads and opportunities identified with your defined BU are assigned to the territory. | See the topics:  
• Defining Territories Using Business Units: Explained  
• Territory Dimension Administration: Explained |
The following figure helps illustrate the different data types, resource organizations, and resources.

Multiple BUs Use Case

The use case described here can help you understand the concepts associated with multiple BUs.

In the use case, Vision Enterprises is a global high-technology company with two divisions: Vision Corp., focused on software, and Vision Systems, selling high-end servers and engineered systems that combine hardware and software in a single stack. Both divisions operate globally across North America, Europe, and Asia Pacific regions, so they create BUs for each of these areas.

The following figure shows the use case. The diagram shows Vision Enterprises as encompassing its two divisions, Vision Corp. and Vision Systems. The diagram shows the two divisions, Vision Corp. and Vision Systems, as each encompassing three BUs: North America, Europe, and Asia Pacific.
Sales Administrator and Multiple BUs

By default, sales administrators have access to only the data available in the BU to which they are associated. However, there are few access paths, such as organization hierarchy and default business unit, through which an administrator could get access to opportunities outside her BU.

Initial Tasks for Business Units

Multiple Business Units High-Level Setup Steps

Several steps and considerations are required to set up multiple business units (BUs) for the sales applications. All of these steps and considerations may or may not be necessary, depending upon which product or business object you are enabling for multiple BU support.

The following table shows the high-level steps to set up multiple-BU functionality in sales, along with where to find more information about each step.

> Note: For the purposes of the sales multiple-BU setup, it’s assumed that your company’s basic enterprise structure, including a legal entity, legal division, and organizations, is already set up.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set sales profile options to enable multiple BUs functionality</td>
<td>Set two profile options to enable the multiple-BU functionality.</td>
<td>See the topic, Setting Sales Business Unit Profile Options: Procedure, for more information.</td>
</tr>
</tbody>
</table>
| Create additional BUs | Define additional business units in the Setup and Maintenance work area. If you have already done this as part of your enterprise setup, then you can skip this step. | • See the topics, Creating Business Units: Overview and Defining Business Units: Procedure  
• The guide, Oracle Applications Cloud Understanding Enterprise Structures, available on the Oracle Help Center |
| Set business unit functions | A business function describes how a business unit is used. You must set business unit functions. If you have already done this as part of your business unit setup, then you can skip this step. | The topic, Setting Business Unit Functions: Procedure |
| Create set-enabled reference data | If you are going to partition reference data by BU, you must create additional reference data sets for set-enabled attributes of objects. | See the topics:  
• Managing Reference Data: Overview  
• Creating Reference Data Sets: Procedure |
<p>| Assign a default reference data set to business units | For each BU for which you want to partition data, assign it a default reference data set. | See the topic, Specifying Business Unit Set Assignments: Procedure |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>More Information</th>
</tr>
</thead>
</table>
| Associate sales resources with BUs using resource organizations | While most sales resources are associated with a single BU, overlay teams might need to work with multiple BUs. You can associate sales team members with one or more BUs. | See the topics:  
  - Sales Resources and Multiple Business Units in Sales: Overview  
  - Associating Resource Organizations With Multiple Business Units: Procedure  
  - Multiple Business Units and Data Access, in the Securing Sales guide |
| Associate BUs with territories | If you want to assign sales team members within territories by BU, you can assign the Business Unit dimension to territories. | See the topics:  
  - Defining Territories Using Business Units: Explained  
  - Territory Dimension Administration: Explained |
| Enable leads and partners to use multiple BUs | You can specify lead attributes and some partner attributes at the BU level. Use Application Composer to enable the Business Unit field in the leads UI. | See the topics:  
  - Multiple Business Units in Leads: Overview  
  - Specifying Leads Business Unit Properties: Procedure  
  - Adding the Business Unit Field in Leads: Procedure |
| Enable opportunities to use multiple BUs | Specify opportunity attributes at the BU level. Use Application Composer to enable the Business Unit field in the opportunities UI. | See the topics:  
  - Multiple Business Units in Opportunities: Overview  
  - Specifying Opportunity Business Unit Properties: Procedure  
  - Adding the Business Unit Field in Opportunities: Procedure |
| Implement company-defined, BU-specific business processes and UI layouts | Use Oracle Application Composer to define and manage UI layouts, workflows, validations, and triggers for different BUs. | See the Extending Sales guide |

**Related Topics**

- Associating Resource Organizations With Multiple Business Units: Procedure
- Multiple Business Units and Data Access: Explained
Setting Sales Business Unit Profile Options: Procedure

To enable multiple business units (BUs) for sales, you must set the two profile options.

The two profile options are:

- **Multiple Business Units Enabled (HZ_ENABLE_MULTIPLE_BU_CRM):** Set this profile option to Yes. The default value is No.
- **Customer Relationship Management Business Unit Default (HZ_DEFAULT_BU_CRM):** Set this to the default sales business unit.

Use the following procedure to set the profile options.

1. Sign in as a setup user or as the sales administrator.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Company Profile
   - Task: Manage Common CRM Business Unit Profile Options
3. In the Manage Common CRM Business Unit Profile Options page, select the HZ_ENABLE_MULTIPLE_BU_CRM profile option and set it to Yes.
4. Click **Save and Close**.
5. Select the HZ_DEFAULT_BU_CRM profile option and set it to the default sales business unit.
6. Click **Save and Close**.

Related Topics
- Associating Resource Organizations With Multiple Business Units: Procedure

Creating Business Units: Overview

A single business unit (BU) is created for you when you install your cloud service. You can define additional BUs in as needed. If you have already done this as part of your enterprise setup, then you can skip this step.

The setup of business units is part of the enterprise structure setup. The following table shows the activities required to set up enterprise structures. For the purposes of the sales multiple-BU setup, it’s assumed that your company’s basic enterprise structure, including a legal entity, legal division, and organizations, is already set up.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Enterprise</td>
<td>Define the enterprise to get the name of the deploying enterprise and the location of the headquarters. This step is completed for you as part of your initial setup. See the Getting Started With Your Implementation guide for more information.</td>
</tr>
<tr>
<td>Define Enterprise Structures</td>
<td>Define enterprise structures to represent an organization with one or more legal entities under common control. Define organizations to represent each area of business within the enterprise.</td>
</tr>
<tr>
<td>Define Legal Jurisdictions and Authorities</td>
<td>Define information for governing bodies that operate within a jurisdiction.</td>
</tr>
</tbody>
</table>
## Step | Description
--- | ---
Define Legal Entities | Define legal entities and legal reporting units for business activities handled by the Oracle cloud applications.
Define Business Units | Define business units of an enterprise to perform one or many business functions that can be rolled up in a management hierarchy.
Define Financial Reporting Structures | Define financial reporting structures, including organization structures, charts of accounts, organizational hierarchies, calendars, currencies and rates, ledgers, and document sequences used in organizing the financial data of a company.
Define Chart of Accounts | Define chart of accounts including hierarchies and values to enable tracking of financial transactions and reporting at legal entity, cost center, account, and other segment levels.
Define Ledgers | Define the primary accounting ledger and any secondary ledgers that provide an alternative accounting representation of the financial data. Some sales implementations do not require recording accounting transactions, and therefore, do not require a ledger.
Define Accounting Configurations | Define the accounting configuration that serves as a framework for how financial records are maintained for an organization.
Define Facilities | Define your manufacturing and storage facilities as inventory organizations if your company tracks inventory balances there and item organizations if your company only tracks the items used in the facility but not the balances.
Define Reference Data Sharing | Define how reference data in the applications is partitioned and shared.

For detailed concepts about implementing the enterprise structure, read the guide, Oracle Applications Cloud Understanding Enterprise Structures, available on Oracle Help Center. The use case in the topic, Multiple Business Units in Sales: Overview, can help you with a sample structure.

For a procedure on how to create additional business units, see the topic, Defining Business Units: Procedure.

### Related Topics
- Enterprise Structures Business Process Model: Explained
- Global Enterprise Configuration: Points to Consider
- Oracle Documentation site

### Defining Business Units: Procedure
You must define business units (BUs) in the Setup and Maintenance work area. If you have already done this as part of your enterprise setup, then you can skip this step.

> **Note:** A single BU is created for you when you initially set up your cloud service. The profile option, HZ_ENABLE_MULTIPLE_BU_CRM, which enables multiple BU functionality for the sales applications, must be set to yes in order to be able to create additional BUs.
Use the following procedure to create additional business units.

1. Sign in as a setup user or as the sales administrator.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Company Profile
   - Task: Manage Business Unit
3. In the Manage Business Units page, select the create icon, or select **Create** from the Actions menu.
4. In the Create Business Unit page, in the **Name** field, enter a name for the BU.
5. Optionally, enter the **Manager** and a **Location**.
6. Ensure that the **Active** check box is selected.
7. Pick a **Default Set** for the BU. This is the reference data set that the BU will use.
   - For more information on reference data sets, see the topics on reference data sets.
8. Click **Save and Close**.

**Setting Business Unit Functions: Procedure**

A business unit can perform many business functions. A business function represents a business process, or an activity that can be performed by people working within a business unit and describes how a business unit is used. You must set business unit functions in the Setup and Maintenance work area. If you have already done this as part of your business unit setup, then you can skip this step.

Use the following procedure to set business unit functions.

1. Sign in as a setup user or as the sales administrator.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Company Profile
   - Task: Assign Business Unit Business Function
3. If, after selecting the **Assign Business Unit Business Function** task, a Select Scope dialog window appears, showing two radio buttons, select the **Assign Business Unit Business Function** option.
   - Select the arrow in the Business Unit field.
   - Click the **Select and Add** option.
   - Click **Apply and Go to Task**.
   - The Select and Add: Business Unit page appears.
   - Search for and select the BU to which you need to assign a function.
   - Click **Select and Add** in the dialog window.
4. After you select a BU, then the Assign Business Functions page appears. In the Business Unit Functions list, select the functions that apply to the business unit.
   - For more information about business unit functions, see the topic, Business Functions: Explained.
5. Click **Save and Close**.

**Related Topics**
- Business Functions: Explained
Managing Reference Data: Overview

Reference data is data that is associated with transactional objects, such as leads and opportunities. Reference data is organized into reference data sets. The reference data model lets companies separate transactional data so that it can be used across business units (BUs) or only for specific BUs. A data set called the Common set is predefined with the application. You can use the Common set for reference data that you want to share across business units. You can also create and maintain company-defined sets and assign them to specific BUs.

Examples of reference data include lists of values, such as the Win/Loss Reason list of values in opportunities, opportunity sales methods lists, opportunity sales stages lists, and price lists.

All reference data is tagged with a configuration ID called Set ID. For example, every value in a list of values in an opportunity is tagged with a Set ID.

You can create separate sets and subsets for each business unit. Alternatively, you can create additional common sets or subsets to enable sharing reference data across several business units, without duplicating the reference data.

The following figure shows an example of reference data in the Common set and different reference data in a set called APAC. Users associated with the BUs assigned to the Common set can access the data associated with it, but they cannot access the data associated with the APAC BU unless they are part of the BUs assigned to that reference data.

You assign reference data sets to set-enabled attributes in the Manage Business Unit Set Assignment page in Setup and Maintenance. For a procedure on assigning data sets to set-enabled data, see the topic, Specifying Business Unit Set Assignments: Procedure.
Creating Reference Data Sets: Procedure

Reference data is organized into reference data sets. You create reference data sets in the Manage Reference Data Sets page in Setup and Maintenance.

Use the following procedure to create reference data sets. In a later step, you assign them to business units. If you have already created reference data sets, you can skip this step.

1. Sign in as a setup user or as the sales administrator.
2. In Setup and Maintenance, go to the Sales offering and search for the Manage Reference Data Sets task.
3. Click the new icon, or select New from the actions menu.
4. On the Manage Reference Data Sets page, enter the appropriate data in the following fields:
   - Set Code: Enter a unique code.
   - Set Name: Enter the name of the set.
   - Description: Enter a description of the set.
5. Click Save and Close.

Specifying Business Unit Set Assignments: Procedure

If you are partitioning reference data so that different business units (BUs) can use different sets of data, you must assign a default set to each business unit. You may have already done this when setting up BUs. If that is the case, then you can skip this step. If you do specify set assignments in this manner, these settings override the setting in the business units edit page.

Use the following procedure to assign reference data sets to business units.

1. Sign in as a setup user or as the sales administrator.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Company Profile
   - Task: Manage Business Unit Set Assignment
3. In the Manage Business Unit Set Assignment page, for each reference data object, select the set that you want to assign to the business unit.
4. Click Save and Close.

Sales Resources and Multiple Business Units

Sales Resources and Multiple Business Units: Overview

You can map multiple business units (BUs) to your resource organizations in order to regulate sales users' visibility into transactional data. Transactional data is the data found in business objects such as opportunities, leads, and contracts.

Note: It is assumed you have already created a resource organization hierarchy according to the instructions in the Getting Started with Your Sales Implementation guide.
Sales User Access to Transactional Data

Sales users’ access to transactional data for an object is the same in multiple BU environments and single BU environments. That is, sales users can access object data across BU boundaries provided that they have valid access to the object by means of territory or team membership, through the resource hierarchy, or by being granted full access to the object. For example, a sales representative can have access to data as determined by team and territory membership, irrespective of the BUs she is associated with.

Business unit assignment can, however, indirectly affect a user’s access to object transactional data. In a multiple BU environment, BUs are available as territory dimensions and can be included as part of the territory coverage definition for the assignment of transactions. A sales user gains access to object data through territory membership. If BU is specified as a territory dimension, then the user’s access to data is limited to objects which, when they were created, were assigned to the same BU that is assigned to the user’s territory team. For more information about data access and users, see the topic, Multiple Business Units and Data Access, in the Securing Sales guide.

Sales Administrator Access to Business Units

Sales administrators, who are created as resources in the organization, have access to all of the data available in the BUs to which they are associated.

Use Case With Resources Across Business Units

In some cases, you may want to have certain types of users have visibility into data across BUs. For example, you may want your overlay sales representatives to have access to all BUs. Here are some examples:

- Associate overlay sales representatives with all business units and differentiate them using territory dimensions, such as geographic region of responsibility.
- Associate sales operations and sales administrators to one, many, or all business units.

In the use case, Vision Enterprises is a global high-technology company with two divisions: Vision Corp., focused on software, and Vision Systems, selling high-end servers and engineered systems that combine hardware and software in a single stack. Both divisions operate globally across North America, Europe, and Asia Pacific regions, so they create BUs for each of these areas.

The following figure shows the use case. The diagram shows Vision Enterprises as encompassing its two divisions, Vision Corp. and Vision Systems. The diagram shows the two divisions, Vision Corp. and Vision Systems, as each encompassing
three BUs: North America, Europe, and Asia Pacific. The diagram shows the following types of users having access to all BUs under both divisions: sales overlay team, sales operations, and sales administrators.

Related Topics
- Data Sharing Mechanisms and Visibility: Overview
- Multiple Business Units and Data Access: Explained

Associating Resource Organizations With Multiple Business Units: Procedure

By associating resource organizations with business units, you can control access to the transactional data available to sales resources in business objects like opportunities and leads.

Use the following procedure to associate resource organizations with multiple business units.

1. Sign in as a setup user or as the sales administrator and navigate to the Setup and Maintenance work area.
2. In Setup and Maintenance go to the Sales offering and search for and select the Manage Resource Organization Members task.
3. In the Manage Resource Organization Members page, search for and select the resource organization that you want to associate with a business unit.
4. In the Organization page, click the Business Units tab.
5. In the table, click the add row icon.
6. Select a business unit from the Business Unit list.
7. Click Save. The first business unit you selected is set as the primary business unit.
8. Similarly, select additional business units from the Business Unit drop-down list.
9. Click **Save and Close**.

### Multiple Business Units in Territories

#### Defining Territories Using Business Units: Explained

You can use the Business Unit dimension in your territory setup to define territory coverage. A territory’s jurisdiction can include one, multiple, or all business units (BUs). In opportunity and lead assignment, when the BU associated with the opportunity or lead matches the BU mapped to the territory, the sales team members within that territory get assigned to the lead or opportunity product line.

When you implement territories, you will enable the Business Unit dimension. When you build your territory hierarchy, you can use the business unit dimension in the territory coverage. There is one territory hierarchy, with one top level territory. In a typical multiple business unit implementation, you define first-level territories by business unit.

The Business Unit dimension also helps facilitate the loading of territory metrics, partitioned by BUs.

- **Tip:** Remember, the application ignores the Business Unit dimension when assigning sales accounts.

#### BUs in Territories Use Case

The use case described here can aid your understanding of using Business Unit as a territory dimension. This use case is expanded from the Vision Enterprises use case used in the related topics on setting up multiple business units.

You will have one territory hierarchy with one top-level territory. Within the top territory, the Vision Enterprises territory structure is defined as:

- One overlay territory that includes all products and all geographies. Child territories can be added to further delineate overlay team member responsibility by product or geography.
- A territory for each business unit. Child territories are defined by product or geography.

The following figure shows the use case. The diagram shows Vision Enterprises as encompassing its two divisions, Vision Corp. and Vision Systems. Each division has three business units, and therefore three first-level territories defined by these business units. The diagram shows an overlay territory defined with all business units, and the Vision Corp North America territory defined by the Vision Corp NA BU. It also shows the Vision Systems North America territory defined by the Vision
Systems NA BU. The Vision Corp NA territory has child territories defined by geography. The Vision Systems NA territory has child territories defined by geography and by product.

Multiple Business Units in Leads

Multiple Business Units in Leads: Overview

Using multiple business units (BUs) in leads lets you offer different versions of the Leads UI according to the BU of the user. Users in one BU cannot view leads from another BU if they do not have the appropriate access. However, you can present different drop-down lists for leads in different BUs.

Multiple Business Units in Leads Use Case

Your company has two divisions, each with three BUs for the geographical areas where they do business: North America, Europe, and Asia. The sales processes between the three business units is different. You can tailor the Leads pages based on the different business units.

For example, when a lead is created in the North America BU, salespeople have a finite set of values to select from in the Lead Reject Reason drop-down list. In contrast, salespeople who work in the Europe BU have different reasons for rejecting a lead and must use values that are specific to their business unit.
Set ID Lookup Types

To enable different values in a drop-down list for a specific BU, you use the supplied set-ID enabled lookup types for leads.

The following table shows the leads set-ID lookup types, the values, and the descriptions. Use the Manage Set Enabled Lookups task from the Setup and Maintenance work area to access the lookup types related to leads.

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Lookup Values</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Qualification Budget Status</td>
<td>• Approved • Pending • Unknown</td>
<td>The approval status of a customer budget. The data is used to assess the lead qualification status.</td>
</tr>
<tr>
<td>Lead Rank</td>
<td>• Cold • Hot • Warm</td>
<td>Lead rank values used as a measure of lead quality and prioritization.</td>
</tr>
<tr>
<td>Lead Reassignment Reason</td>
<td>• No activity • Other • Workload</td>
<td>Possible reasons specified for reassigning leads.</td>
</tr>
<tr>
<td>Lead Reject Reason</td>
<td>• Duplicate lead • Failed to reach contact • Incorrect data</td>
<td>Possible reasons specified for rejecting leads. Rejected leads can be reassigned or retired.</td>
</tr>
<tr>
<td>Lead Retire Reason</td>
<td>• Duplicate lead • No purchase interest</td>
<td>Possible reasons for retiring leads. Retired leads are considered closed leads.</td>
</tr>
<tr>
<td>Lead Registration Type</td>
<td>• Co-sell • Referral • Resale</td>
<td>Types of leads available for partners.</td>
</tr>
<tr>
<td>Lead Source Channel</td>
<td>• Direct mail • E-Mail • Fax • Marketing Cloud • Phone • Sales campaign • Sales visit • Social • Company website • Wireless message • Model-based prediction • Rules-based prediction</td>
<td>Source channel responsible for lead generation.</td>
</tr>
<tr>
<td>Lead Time Frame</td>
<td>• 3 months • 6 months • 9 months • 12 months • 15 months • 18 months</td>
<td>Lead cycle duration that usually coincides with a typical sales cycle duration for products and services offered.</td>
</tr>
</tbody>
</table>
Selecting BUs in the Leads UI

Some users can transact in multiple BUs, for example, salespeople who are members of different sales teams. These users can select the BU they want when the lead is being created. Based on their selection, the set ID-enabled lookup types display based on the BU of their choice.

Additional Leads Modification by Business Units

You can modify BUs to meet your specific leads requirements. For example, you can:

- Select which assignment rules to use for your leads, which lead assessment templates to use, and so on.
- Set BU attributes to be visible in the Add Fields UI when performing a search for leads.
- Hide BU attributes for single BU deployments in all transaction and search UIs.
- Hide BU attributes for multiple BU deployments for users who transact in one BU only.

Specifying Leads Business Unit Properties: Procedure

You can set several lead settings at the business unit (BU) level. When you set an option such as a rule or template at the BU level, the option setting is effective for only the BU that you indicate. You set lead BU-level options in the Specify Sales Business Function Properties page, under the Lead Settings section.

Use the following procedure to specify business unit properties for leads:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Company Profile
   - Task: Specify Sales Business Function Properties

2. If a BU is not associated with the task, the application prompts you to select one. The Select Scope dialog box appears. In this dialog box:
   a. Select the Specify Sales Business Function Properties radio button.
   b. In the Business Unit list of values, click Select and Add and add the BU.
   c. After you have selected the BU, click Apply and Go to Task.

3. In the Specify Sales Business Function Properties page, under the Lead Settings section, set the options for the following:
   - Lead Templates
   - Lead Conversion Mapping

4. Save your changes.

BU-Enabled Lead Profile Options

The following table describes the lead template and copy map BU-enabled profile options and their default values, if any.

<table>
<thead>
<tr>
<th>Profile Option</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qualification Assessment Template</td>
<td>Specify the qualification template to use for evaluating and qualifying leads.</td>
<td>None</td>
</tr>
</tbody>
</table>
Profile Option | Description | Default Value
---|---|---
Direct Lead to Opportunity Copy Map | Specify the mapping file name created in Application Composer, Copy Maps. This file is used to map objects and attributes when a direct lead is converted to an opportunity. | None
Partner Lead to Opportunity Copy Map | Specify the mapping file name created in Application Composer, Copy Maps. This file is used to map objects and attributes when a partner lead is converted to an opportunity. | None

Related Topics
- Accessing Tasks to Update Existing Setup Data: Procedure

Adding the Business Unit Field in Leads: Procedure
Sales personnel can associate a business unit with a lead, if you have enabled the functionality. Use Oracle Application Composer to add the Business Unit field to the leads UI. This enables a finite list of values to be displayed in the drop-down list of the Business Unit field.

Adding the Business Unit Field
Use the following procedure to add the Business Unit field to the Edit Lead page:

1. Sign in to the application as the sales administrator or a setup user, such as application implementation consultant.
2. Create and activate a sandbox to work in.
3. Navigate to Application Composer.
4. In the Application Composer page, select Sales to filter the object search.
5. Expand Standard Objects and navigate to Sales Lead > Pages. The Sales Leads: Pages page appears.
6. In the Sales Leads: Pages page, ensure that the Simplified Pages tab is active.
7. In the Details Page Layouts region, click the duplicate layout icon to duplicate and edit an existing layout.
   - The Duplicate Layout dialog window appears. Note that you may be using a different layout than the default one. If this is the case, then select the appropriate layout.
8. In the Duplicate Layout dialog window, enter the new layout name and select the existing page layout to duplicate.
9. Click Save and Edit.
   - The Details Layout: Default custom layout page appears, with the name of the new layout in the page title.
10. In the Summary subtab region, click the edit icon.
   - The Details Layout: Default custom layout: Edit Summary page appears.
11. In the Details Layout: Default custom layout: Edit Summary page, find the Business Unit field in the Configure Detail Form list. Move the field from the Available Fields list to the Selected Fields list.
12. Click Save and Close.
13. Click Done in the Details Layout: Default custom layout page.
14. Validate the change by navigating to the edit lead page and ensuring that you can see the Business Unit field in the edit opportunity page.
   Note that the user you sign in with to validate the change must belong to a sales resource organization. For example, you must sign in as a sales representative.
15. Publish the sandbox.
16. The Business Unit field is now available to sales users in the edit lead pages.

Mapping the Lead Business Unit for Territory Assignment: Procedure

A Business Unit (BU) represents a unit of the enterprise that performs a particular business function such as sales, service or marketing. This topic is applicable for the lead assignment set up where you want the BU to be used during territory assignment processing. In order to use the BU for territory assignment, you need to set up the assignment mapping between the lead BU field and the BU territory dimension.

The following procedure outlines the required setup for a scenario where your organization:

- Has multiple business units with defined territories
- Wants to assign sales leads based on the business unit

If the lead is contained in BU1, then you want to set up assignment mapping so that territory assignment only matches the BU1 territories along with any matching dimensions. For example, matching dimensions might include geography, product, account type, sales channel and so forth.

Setting the Lead Business Unit Field to Active

To set the Business Unit mapping to active, perform the following steps:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Leads
   - Task: Manage Sales Lead Assignment Objects
2. On the Manage Sales Lead Assignment Objects page, locate and select Sales Lead in the Name column.
3. In the Sales Lead: Details region, select the Candidates tab.
4. Select the Sales Lead Territory candidate.
5. Select the Sales Lead Territory: Mapping Sets tab.
6. In the Name column, select from one of the following active mapping sets for the sales lead object that you want:
   - Mapping Set 1
   - Mapping Set 2
   - Mapping Set 3
   - Mapping Set 4
   - Mapping Set 5
7. In the Mapping Set: Mappings region, locate and select the BU dimension function code.
8. Deselect the Inactive check box to make the function code active.
9. Repeat steps 2 through 4 for each sales lead Mapping Set.
10. Click Save and Publish.
11. Monitor and refresh the page to confirm the publish process has succeeded.
The sales lead assignment processing is now ready to use the active BU information when assigning territories.

**Related Topics**
- Accessing Tasks to Update Existing Setup Data: Procedure

**Multiple Business Units in Opportunities**

**Multiple Business Units in Opportunities: Overview**
Using multiple business units in opportunities lets users associate opportunities and related attributes with a specific business unit (BU) and then report on the data by BU.

**Business Units and Opportunity Attributes**
In addition to associating an opportunity itself with a BU, you can also associate several opportunity attributes with business units.

The following opportunity attributes are set-enabled and hence allow association with a business unit and with reference data sets. Reference data sets let objects share reference data across BUs. For example, you can choose to have opportunity the Win/Loss Reason lookup type shared across BUs, or you can choose to have each BU manage its own. You can also assign a reference data set to reference data objects, such as sales methods.

- Opportunity lookup types:
  - Win/Loss Reason (MOO_SETID_WIN_LOSS_REASON)
  - Strategic Value (MOO_SETID_STRATEGIC_VALUE)
  - Opportunity Assessment Override Reason (MOO_SETID_ASSESS_OVRRIDE_RSN)
  - Decision Level (MOO_SETID_DECISION_LEVEL)
  - Estimated Deal Duration (MOO_SETID_DEAL_HORIZION)
  - Level of Risk (MOO_SETID_RISK_LEVEL)
  - Sales Revenue Category (MOO_SETID_REVN_CATEGORY)
  - Sales Revenue Type (MOO_SETID_REVENUE_TYPE)

- Sales methods
- Sales statuses

When you enable set-ID lookup types, you must assign them to a business unit in the Manage Set Enabled Lookups page in the Setup and Maintenance work area. To find this page, do the following:

1. Sign in as a setup user or sales administrator.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Set Enabled Lookups

For more information, see the related topic, Managing Set-Enabled Lookups: Example.
For more information about reference data sets, see the topic, Business Units and Reference Data Sets: How They Work Together. Also consult the online help, using keywords "reference data".

You can set several opportunity profile options at the business unit level, as well as specify the default sales method for a business unit. For more information, see the topic, Specifying Sales Business Function Properties: Procedure.

Specifying Opportunity Business Unit Properties: Procedure

You can set several opportunity profile options, including the one for default sales method, at the business unit (BU) level. When you set a profile option at the BU level, the profile option setting is effective for only the BU that you indicate. You set opportunity BU-level profile options in the Specify Sales Business Function Properties page.

Use the following procedure to specify business unit properties for opportunities:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Company Profile
   - Task: Specify Sales Business Function Properties

2. If a BU is not associated with the task, the application prompts you to select one. The Select Scope dialog box appears. In this dialog box:
   a. Select the Specify Sales Business Function Properties radio button.
   b. In the Business Unit list of values, click Select and Add and add the BU.
   c. After you have selected the BU, click Apply and Go to Task.

3. In the Specify Sales Business Function Properties page, set the profile options as needed. Guidance is provided in the section in this topic, BU-Enabled Profile Options

4. Save your changes.

BU-Enabled Profile Options

The following are the opportunity BU-enabled profile options.

<table>
<thead>
<tr>
<th>Profile Option</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Method</td>
<td>Determines the default sales method the application picks when an opportunity is first created.</td>
<td>Standard Sales Process</td>
</tr>
<tr>
<td>Require Win/Loss Reason</td>
<td>Determines whether, when closing an opportunity, the user is required to enter a win/loss reason. Applies both at the opportunity and revenue item levels.</td>
<td>Yes</td>
</tr>
<tr>
<td>Require Competitor</td>
<td>Determines whether, when closing an opportunity, the user is required to enter a competitor. Applies both at the opportunity and revenue item levels.</td>
<td>Yes</td>
</tr>
<tr>
<td>Territory-Based Resource Assignment Style</td>
<td>Determines whether the application copies all territory resources to the opportunity team or just the territory owner during territory assignment.</td>
<td>All</td>
</tr>
</tbody>
</table>
Adding the Business Unit Field in Opportunities: Procedure
Sales users can associate a business unit with an opportunity, if you have enabled the functionality. To enable the Business Unit list of values in the opportunities UI, use Oracle Application Composer to add the field to the opportunities UI.

Adding the Business Unit Field
Use Oracle Application Composer to add the Business Unit field to the opportunities UI. Available BUs display to users as a drop-down list in the Business Unit field. See the following procedure.

🔍 Note: When modifying the UI, you must make your changes in a sandbox. See the Extending Sales guide for more information about using sandboxes.

1. Sign in to the application as the sales administrator or a setup user, such as application implementation consultant.
2. Create and activate a sandbox to work in.
3. Navigate to Application Composer.
5. In the Opportunity: Pages page, ensure that the Simplified Pages tab is active.
6. In the Details Page Layouts region, select the Standard Layout in the table and then click the Duplicate icon. The Duplicate Layout dialog box appears.
   Note that you may be using a different layout than the default one. If this is the case, then select the appropriate layout.
7. Enter a name for the new layout and click Save and Edit.
   You are returned to the edit page for the new layout.
8. In the Summary subtab region, click the edit icon.
   The Details Layout: Default Layout: Edit Summary page appears.
9. In the Details Layout: Default Layout: Edit Summary page, find the Business Unit field in the Configure Detail Form list. Move the field from the Available Fields list to the Selected Fields list.
10. Click Save and Close.
11. Click Done in the Details Layout: Default Layout page.
12. Validate the change by navigating to the edit opportunity page and ensuring that you can see the Business Unit field in the edit opportunity page.
   Note that the user you sign in with to validate the change must belong to a sales resource organization. For example, you must sign in as a sales representative.
13. Publish the sandbox.
14. The Business Unit field is now available to sales users in the edit opportunity simplified pages.
Enabling Opportunity Territory Assignment by BU: Procedure

A business unit (BU) represents a unit of the enterprise that performs a particular business function, such as sales, service, or marketing. You can configure the application to assign opportunities based on the BU. In order to use BU during territory assignment, you need to activate the assignment mapping between the opportunity revenue BU field and the BU territory dimension.

The following procedure outlines the required setup for a scenario where your organization:

- Has multiple BUs, with defined territories
- Wants to assign opportunities based on the BU

If the opportunity is contained in BU1, then you want to set up assignment mapping so that territory assignment only matches the BU1 territories, along with any matching dimensions. For example, matching dimensions might include geography, product, account type, and sales channel.

Setting the Opportunity Revenue BU Field to Active

Use the following procedure to set the opportunity revenue BU field to active:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Sales Assignment Manager Objects
2. In the Name column of the Manage Sales Assignment Manager Objects page, locate and select Revenue.
3. In the Revenue: Details region, select the Candidates tab.
4. Select the Territory candidate.
5. Select the Territory: Mapping Sets tab.
6. In the Name column, select Sales Account Mapping Set.
7. In the Sales Account Mapping Set: Mappings region, locate and select the BUUnit dimension function code.
8. Click the edit icon on the table to go into edit mode.
   The Edit Mapping window appears.
9. Deselect the Inactive check box to make the function code active. Click OK.
10. Click Save and Publish.
11. Monitor and refresh the page to confirm the publish process has succeeded.

The opportunity assignment processing is now ready to use the BU information when assigning territories.

Related Topics

- Setting Up Opportunity Revenue: Points to Consider
- Accessing Tasks to Update Existing Setup Data: Procedure

Changing the Business Unit for a Subset of Opportunities: Procedure

Salespeople can update the business unit on an opportunity. They can also update the set-enabled lookup values on the opportunity and revenue lines.
The following section outlines the steps for adding new specific or common set values for sales methods and stages. It outlines the steps for enabling and disabling existing lookup values for:

- Set-enabled lookups for opportunity management tasks as follows:
  - Manage Levels of Risk
  - Manage Strategic Values
  - Manage Decision Levels
  - Manage Deal Horizons
  - Manage Win/Loss Reasons
  - Manage Opportunity Revenue Types

- Sales Status lookup values
- Specific Sales Method and Sales Stage for the Sales Method

You set lookup values from the relevant tasks available from the Define Opportunity Management Lookups page. This page is accessible from the Sales offering work area. When all of the setup related to the Lookups, Sales Method and Sales Stage is complete, navigate to the Define Business Units. You can then select a business unit you have newly added. Once you have selected your business unit, navigate to the Manage Business Unit Set Assignment task where you save your setup for the specific business unit.

### Changing the Business Unit for Opportunities

Use the following procedure to create specific values or for enabling and disabling existing lookup values for opportunities. You also setup the Sales Status, Sales Method, and Sales Stage before you select your business unit to apply the changes.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Define Opportunity Management Lookups

2. On the Define Opportunity Management Lookups page, select the opportunity task that you want. Then, add a new set-enabled lookup value or either enable or disable an existing lookup value.

3. Once the setup is done for the task lookup codes, navigate to the Setup and Maintenance work area and go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Sales Status

    Search for and select the task.

    The appears.

4. In the **Sales Statuses** section of the Manage Sales Statuses page, add a new sales status or select or deselect **Active** for an existing sales status.

5. Next, go to the Manage Sales Methods and Sales Stages task.

6. Add a new Sales Method and Sales Stage for the Sales Method that you want.

7. Once all of the setup related to the Lookups, Sales Status, Sales Method and Sales Stage is complete, navigate to the Define Business Units task.
8. Select a business unit you have newly added and navigate to the Manage Business Unit Set Assignment task.

9. Click **Save and Close**. Repeat step 9 and step 10 for each new individual business units you have added.

For more information about the other business setups not covered in this topic, see the help. Use keywords "business unit" and "opportunity".

**Related Topics**

- Accessing Tasks to Update Existing Setup Data: Procedure

**Additional Implementation Concepts for Business Units**

### Reference Data Sets: Explained

Reference data sets are logical groups of reference data that various transactional entities can use depending on the business context. You can get started using either the common reference data set or the enterprise set depending on your implementation requirement. You can also create and maintain additional reference data sets, while continuing to use the common reference data set.

Consider the following scenario. Your enterprise can decide that only some aspects of corporate policy should affect all business units. The remaining aspects are at the discretion of the business unit manager to implement. This enables your enterprise to balance autonomy and control for each business unit. For example, your enterprise holds business unit managers accountable for their profit and loss, but manages working capital requirements at a corporate level. Then, you can let managers define their own sales methods, but define payment terms centrally. As a result, each business unit has its own reference data set for sales methods and one central reference data set for payment terms assigned to all business units.

### Partitioning

Partitioning reference data and creating data sets provide you the flexibility to handle the reference data to fulfill your business requirements. You can share modular information and data processing options among business units with ease. You can create separate sets and subsets for each business unit. Alternatively, you can create common sets or subsets to enable sharing reference data between several business units, without duplicating the reference data.
The following figure illustrates the reference data sharing method. The user can access the data assigned to a specific set in a particular business unit, as well as access the data assigned to the common set.

**Related Topics**
- Reference Data Sets and Sharing Methods: Explained

**Business Units and Reference Data Sets: How They Work Together**
Reference data sharing enables you to group set-enabled reference data such as jobs or grades to share the data across different parts of the organization. Sets also enable you to filter reference data at the transaction level so that only data assigned to certain sets is available to be selected. To filter reference data, Oracle Fusion Human Capital Management (HCM), applications use the business unit on the transaction. To set up reference data sharing in Oracle Fusion HCM, you create business units and sets, and then assign the sets to the business units.

**Common Set Versus Specific Sets**
Some reference data in your organization may be considered global, and should therefore be made available for use within the entire enterprise. You can assign this type of data to the Common Set, which is a predefined set. Regardless of the business unit on a transaction, reference data assigned to the Common Set is always available, in addition to the reference data assigned to the set that corresponds to the business unit on the transaction.

Other types of reference data can be specific to certain business units, so you can restrict the use of the data to those business units. In this case, you can create sets specifically for this type of data, and assign the sets to the business units.
Business Unit Set Assignment

When you assign reference data sets to business units, you assign a default reference data set to use for all reference data types for that business unit. You can override the set assignment for one or more data types.

Example: Assigning Sets to Business Units

InFusion Corporation has two divisions: Lighting and Security, and the divisions each have two locations. Each location has one or more business functions.

The following figure illustrates the structure of InFusion Corporation.

When deciding how to create business units, InFusion decides to create them using the country and business function level. Therefore, they created the following business units:

- Sales_Japan
- Marketing_Japan
- Sales_US
- Sales_UK
- Marketing_India
- Sales_India

Because locations, departments, and grades are specific to each business unit, InFusion does not want to share these types of reference data across business units. They create a reference data set for each business unit so that data of those types can be set up separately. Because the jobs in the Sales business function are the same across many locations, InFusion decides to create one additional set called Jobs. They override the set assignment for the Jobs reference data group and assign it to the Jobs set. Based on these requirements, they create the following sets:

- Sales_Japan_Set
The following table describes the default set assignment and the set assignment overrides for each business unit in InFusion:

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>Default Set Assignment</th>
<th>Set Assignment Overrides</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales_Japan</td>
<td>Sales_Japan_Set for grades, departments, and locations</td>
<td>Jobs set for jobs</td>
</tr>
<tr>
<td>Marketing_Japan</td>
<td>Mktg_Japan_Set for grades, departments, and locations</td>
<td>None</td>
</tr>
<tr>
<td>Sales_US</td>
<td>Sales_US_Set for grades, departments, and locations</td>
<td>Jobs set for jobs</td>
</tr>
<tr>
<td>Sales_UK</td>
<td>Sales_UK_Set for grades, departments, and locations</td>
<td>Jobs set for jobs</td>
</tr>
<tr>
<td>Marketing_India</td>
<td>Mktg_India_Set for grades, departments, and locations</td>
<td>None</td>
</tr>
<tr>
<td>Sales_India</td>
<td>Sales_India_Set for grades, departments, and locations</td>
<td>Jobs set for jobs</td>
</tr>
</tbody>
</table>

When setting up grades, departments, and locations for the business units, InFusion assigns the data to the default set for each business unit. When setting up jobs, they assign the Jobs set and assign the Common Set to any jobs that may be used throughout the entire organization.

When using grades, departments, and locations at the transaction level, users can select data from the set that corresponds to the business unit they enter on the transaction, and any data assigned to the Common Set. For example, for transactions for the Marketing_Japan business unit, grades, locations, and departments from the Mktg_Japan_Set is available to select, as well as from the Common Set.

When using jobs at the transaction level, users can select jobs from the Jobs set and from the Common Set when they enter a sales business unit on the transaction. For example, when a manager hires an employee for the Sales_India business unit, the list of jobs is filtered to show jobs from the Jobs and Common sets.

The following figure illustrates what sets of jobs can be accessed when a manager creates an assignment for a worker.
Assigning Reference Data Sets to Reference Objects: Points to Consider

You can assign the reference data sets to reference objects using the Manage Reference Data Set Assignments page. For multiple assignments, you can classify different types of reference data sets into groups and assign them to the reference entity objects. The assignment takes into consideration the determinant type, determinant, and reference group, if any.

Determinant Types

The partitioned reference data is shared using a business context setting called the determinant type. A determinant type is the point of reference used in the data assignment process. The following table lists the determinant types used in the reference data assignment.

<table>
<thead>
<tr>
<th>Determinant Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asset Book</td>
<td>Information about the acquisition, depreciation, and retirement of an asset that belongs to a ledger or a business unit.</td>
</tr>
<tr>
<td>Business Unit</td>
<td>The departments or organizations within an enterprise.</td>
</tr>
<tr>
<td>Cost Organization</td>
<td>The organization used for cost accounting and reporting on various inventory and cost centers within an enterprise.</td>
</tr>
<tr>
<td>Project Unit</td>
<td>A logical organization within an enterprise that is responsible for enforcing consistent project management practices.</td>
</tr>
<tr>
<td>Reference Data Set</td>
<td>References to other shared reference data sets.</td>
</tr>
</tbody>
</table>
Determinant
The determinant (also called determinant value) is a value that corresponds to the selected determinant type. The determinant is one of the criteria for selecting the appropriate reference data set.

Reference Groups
A transactional entity may have multiple reference entities (generally considered to be setup data). However, all reference entities are treated alike because of similarity in implementing business policies and legal rules. Such reference entities in your application are grouped into logical units called reference groups. For example, all tables and views that define Sales Order Type details might be a part of the same reference group. Reference groups are predefined in the reference groups table.

Managing Set-Enabled Lookups: Examples
Creating a new set-enabled lookup is similar to creating a standard lookup with the addition of specifying a reference data set determinant for the lookup codes. You can only create or edit lookup codes for a particular lookup type if its configuration level supports it.

The reference data set for a set-enabled lookup code is part of its foreign key. This is unlike other set-enabled entities. Use the Manage Set Assignments task to define and manage reference data set assignments.

Selecting a Reference Group for a Set-Enabled Lookup Type
Specify a reference group for a set-enabled lookup type to indicate which reference data set assignments are available for its lookup codes. For example a COLORS lookup type might be set-enabled for a Countries reference group that includes the US and EU reference data set assignments.

Selecting a Reference Data Set for a Set-Enabled Lookup
The reference data set determines which lookup code is included in the list of values. For example, there are two references data sets - one for the US and the other for EU. If a COLORS lookup type contains RED, YELLOW, ORANGE, and GREEN lookup codes, you can enable one RED lookup code from the US reference data set and another RED lookup from the EU reference data, each lookup code having different meanings.

The following table elaborates the example, how these two reference data sets (US and EU) contain one lookup code that is common, but each differing in its lookup meaning.

<table>
<thead>
<tr>
<th>Reference Data Set</th>
<th>Lookup Code</th>
<th>Lookup Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>US</td>
<td>RED</td>
<td>Red</td>
</tr>
<tr>
<td>US</td>
<td>YELLOW</td>
<td>Yellow</td>
</tr>
<tr>
<td>US</td>
<td>GREEN</td>
<td>Green</td>
</tr>
<tr>
<td>EU</td>
<td>RED</td>
<td>Rouge</td>
</tr>
<tr>
<td>EU</td>
<td>ORANGE</td>
<td>Orange</td>
</tr>
</tbody>
</table>
Some lookup codes may be unique to one or another reference data set as the ORANGE lookup is to the EU reference data set in the example.

In another example in the following table, a lookup type called HOLD_REASON provides a list of reasons for putting a contract renewal on hold. Reference data sets determine which codes are included in the Hold Reason list of values.

<table>
<thead>
<tr>
<th>Reference Data Set</th>
<th>Lookup Code</th>
<th>Lookup Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>US</td>
<td>SEC</td>
<td>SEC Compliance Review</td>
</tr>
<tr>
<td>US</td>
<td>DIR</td>
<td>Needs Director's Approval</td>
</tr>
<tr>
<td>US</td>
<td>VP</td>
<td>Needs Vice President's Approval</td>
</tr>
<tr>
<td>CHINA</td>
<td>CSRC</td>
<td>Pending China Securities Regulatory Commission Review</td>
</tr>
<tr>
<td>CHINA</td>
<td>PR</td>
<td>Needs President’s Approval</td>
</tr>
<tr>
<td>COMMON</td>
<td>REQUESTED</td>
<td>Customer Request</td>
</tr>
</tbody>
</table>

Referring to the example in the table, when end-users place a contract on hold in the US business unit, the three reason codes in the US set are available. When placing a contract on hold in the China business unit, the two codes in the China set are available.

**Related Topics**

- Managing a Standard Lookup: Example

**Defining Default Reference Data Sets: Points to Consider**

Assign a default reference data set to a new business unit. This default set will then be assigned to all the reference data objects for the business unit, such as such as payables payment terms, and receivables accounting rules. To assign the default set, select an existing reference data set or create a new one.

**Creating Default Reference Data Sets for a Business Unit**

Use the Create Business Unit or the Edit Business Units pages to create a reference data set.

The creation of the reference data set for an existing business unit will not impact the actual sets previously assigned to the business unit. If you want to use the newly created set for your existing business unit use the Manage Set Assignments task, and assign the set to each reference data object you want to change.

**Note:** You must use the Manage Set Assignments task to assign the set to each specific reference data object that you want to change. In order to activate the set assignments, you must save the record, even if you have not made any updates.
Creating Reference Data Sets in the Enterprise Structures Configurator: Explained

If you created business units automatically, then the Enterprise Structures Configurator automatically creates reference data sets for you. The Enterprise Structures Configurator creates one reference data set for each business unit. You can add additional sets, but you cannot delete any of the sets that were created automatically.

A standard set called the Enterprise set is predefined.

Common Set

The Common set is a predefined set that enables you to share reference data across business units. When you select set-enabled data at the transaction level, the list of values includes data in the:

- Common set
- Set associated with the data type for the business unit on the transaction

For example, when you create an assignment, the list of values for grades includes grade in the:

- Common set
- Set that is assigned to grades for the business unit in which you creating the assignment
7 Setting Up Territories

Territory Management Features: Overview

Sales territories form the fundamental infrastructure of sales management because territories define the jurisdiction that salespeople and channel managers have over accounts, contacts, households, partners, and associated transactions. Territories provide the rules for automatically assigning salespeople and other resources to accounts, contacts, households, partners, leads, and opportunity line items. The structural hierarchy of territories defines resource responsibilities and controls access to customer and sales data.

Summary of Features

The key features of Territory Management include the following:

- Territories serve as a basis for forecasting, quota distribution, compensation, and analysis of sales performance. Forecasts roll up according to the territory hierarchy.
- Use territories to assign resources and secure access to accounts, contacts, households, partners, leads, and opportunities.
- Channel sales managers are assigned to partners and partner transactions within their territories.
- Define territories by logical boundaries called dimensions. Examples of these include geography, industry, product, customer size, sales channel, and organization type.
- Define territories by selecting a list of specific accounts, contacts, households, or partners.
- Model territory realignments and perform what-if analyses to find optimal territory changes.
- Analyze metrics to understand the results of changes to the boundaries of each territory or to understand the ongoing performance of active territories. View gap and overlap reports to see whether there are any undesired results.
- Use assignment preview to double-check that each territory is getting the right customers.

Territory Concepts

Territory Benefits

Territories are foundation components that enable many key Sales Force Automation processes. These key capabilities can improve the overall performance of your sales organization. You can use territories to:

- Model your sales organization hierarchy
- Assign the most effective sales team to your accounts and opportunities
- Provide shared data visibility to encourage collaboration and team cross-selling
- Optimize sales coverage and maximize revenue with balanced territories
• Reduce territory administration costs and errors

Modeling Your Sales Organization: Explained

One of the most critical aspects of a Sales Force Automation implementation is the definition of the sales organization hierarchy and the assignment of your sales resources within this structure. This structure represents how your sales force is organized internally and should be aligned with your sales strategy and how you sell in your marketplace. This structure drives data visibility for your sales users, rolls up the sales forecast, and aggregates data to measure performance at each level within your sales organization.

• A territory can represent the responsibility of a salesperson such as a set of customers
• A territory can represent the responsibility of a sales manager or executive such as geographic region, line of business, product line, customer segment, or sales channel
• A territory can represent the responsibility of a channel account manager, including a specific set of partners and their respective sales activities
• A territory can represent a branch or a sales office composed of a sales team that is collectively responsible for selling to customers in a specific geographic region
• A territory can represent the jurisdiction of a channel partner such as authorizing the partner to sell a specific set of products to a set of customers

Territories are organized in a hierarchy. While there is one single global territory structure for the entire enterprise, each branch of the overall structure represents a different part of the sales organization. The hierarchical relationship between territories at different levels defines how the data aggregation and visibility are rolled up.

Each territory is associated with one or more sales resources that form the sales team for that territory. Each resource on the territory team may have a designated function based on the role that team member has in the context of that territory. A resource may be assigned to multiple territories with the same or different roles.

Financial Company Example

Depending on your specific industry and business model, a territory can be used to model any part of your sales organization. The following examples illustrate different scenarios:

The following figure shows an example of an international financial services company and its territory structure. The International Bank has six lines of business which are business units:

• Great Western
• UK Banking
• Business Banking
• Personal Banking
• Wealth Management
• Wholesale Banking

The figure highlights the Personal Banking business unit and the following territory coverage:

1. The Brand dimension is Brand 2.
2. The State dimension is New South Wales.
3. The Region dimension is Region 2.
4. The Branch dimension within Region 2 contains three branches.

The overall structure shows different lines of business. Within the Personal Banking line of business, territories are further broken down by brand, geography (state, and then region), and branch. Using this same example, the Wealth Management line of business is organized differently as shown in the following figure. The Wealth Management line of business defines territories by brand, customer segment, channel, and product.
For Wealth Management, territories are broken out by brand, customer segment, sales channel, and product line. This example demonstrates how a territory can be used to define different parts of your sales organization and how it can be organized in a hierarchical structure.

**Automated Territory Assignment: Explained**

A key function is to automate assignment of territories to transactional objects. Territories are assigned to objects by matching territory coverage with the attribute values of the object.
Territory Coverage
Territory coverage defines the boundary of each territory and in essence, describes the business rules by which assignments are performed. There are three primary ways that territory coverage can be defined:

- **Dimensional Coverage**
  
  This is a combination of dimensions with a list of values for each dimension. A territory dimension is mapped to an attribute on transactional objects during assignment processing. For example, the geography dimension on the territory is mapped to the address of the account or the partner. The following standard dimensions are provided: geography, product, industry, account type, organization type, customer size, and sales channel. Three additional dimensions are provided for you to configure to your business needs.

- **Inclusion Coverage**
  
  This specifies an explicit list of named accounts, contacts, households, or partners to be included.

- **Exclusion Coverage**
  
  This identifies a list of named accounts, contacts, households, or partners to be excluded.

Territories can be defined using a combination of different coverage definitions, thus giving your organization the power to model complex territories. A few examples that illustrate this follow:

- **Sam** is a territory field salesperson who covers all the small accounts in California.
  
  Sam’s territory can be defined by using a dimensional coverage with two dimensions \(\text{Geography} = \text{California}, \text{Customer Size} = \text{Small}\).

- **Steve** is a key account director who covers three enterprise accounts, namely ACME Inc, Vision Corporation, and Pinnacle Technologies.
  
  Steve’s territory can be defined by using inclusion coverage with three explicit accounts: ACME Inc, Vision Corporation, and Pinnacle Technologies.

- **Amanda** is a territory field salesperson who covers all the high tech accounts in Northern California. In addition, ABC Technologies, located in southern California, was also assigned to Amanda because she has a prior relationship with the CFO.
  
  Amanda’s territory can be defined by using a dimensional coverage with two dimensions \(\text{Geography} = \text{Northern California}, \text{Industry} = \text{High Tech}\) and an inclusion coverage with one explicit account, ABC Technologies.

- **Kevin** is a BI Server product specialist who covers all accounts located in the Northwest region with the exception of Pinnacle Technologies. Pinnacle Technologies was assigned as a named account to a key account director.
  
  Kevin’s territory can be defined by using a dimensional coverage with two dimensions \(\text{Geography} = \text{Northwest}, \text{Product} = \text{BI Server}\) and an exclusion coverage with one excluded account, Pinnacle Technologies.

Territory Assignment Execution
You can configure when territories are assigned to transactional objects and the frequency the assignment process should be executed. Territories can be assigned in real time as new transactions are created or when existing transactions are updated. You can also configure territory assignment to be run as a background process to assign transactions in batch. This is the recommended approach if you have a large volume of transactions.

During assignment execution, transactional attribute values are matched against territory coverage and all matching territories are assigned to the object. As an example, on a given opportunity, you can assign multiple territories composed of the sales team: the account representative, the industry overlay, a product specialist, the channel partner, and the channel account
manager. This enables you to assemble the most effective sales team for each opportunity and to maximize your chances for closing the deal.

Territory-Driven Visibility: Explained

After territories are assigned to transactional objects, territory team members gain visibility into these objects through the territory hierarchy. In the following figure, a salesperson Dave Smith has access to the account because his territory is directly assigned to the account record. His regional manager and sales director also gain access to the same account because their territories are ancestors of Dave’s territory. By contrast, Regional Manager 2 does not have access to the account because her territory is not a direct ancestor of Dave’s territory.

Combining flexible assignment rules and territory-driven visibility, you gain precise control over data visibility and data sharing policies. For large enterprise sales organizations with complex sales teams such as the following example, shared visibility on customer and opportunity data can further facilitate collaboration and team cross-selling. The following figure shows the North America Sales team that includes channels and a sales VP. The sales VP has a Sales Director managing salespeople, and a Product Overlay group with a product specialist. The Channels division includes channel representatives. An opportunity is assigned to a channel representative, a product specialist, and a salesperson.
Territory Optimization: Explained

You can model your sales territories in advance and evaluate the effectiveness of your territories using powerful what-if analysis capabilities. With these tools, you can easily determine if your territories are equitable and balanced or if there are any gaps or overlaps in your coverage. This provides sales leaders with valuable insights to optimize sales coverage.

Territory Proposals

Territory changes can be modeled using territory proposals. A territory proposal enables you to evaluate the business impact of territory changes prior to rolling them out to your organization, resulting in better business decisions.

You have access to numerous what-if analysis capabilities to assess the effectiveness of territory changes within a proposal, including the following:

• Territory Metrics
  You have a number of prebuilt territory metrics based on past revenue performance, as well as current sales pipeline and forecast. Leveraging these real-time metrics, you can create more equitable and balanced territories to optimize sales coverage.

• Territory Gap and Overlap Reports
Gaps in territory coverage can result in lost opportunities and revenue. On the other hand, overlaps in territory coverage can potentially cause channel conflict and encourage undesired sales behavior. You can identify such conditions in your territory model by running a set of prebuilt reports and then taking corrective action to proactively mitigate channel conflict and maximize revenue potential. (Run Load and Activate from the Enable Dimensions and Metrics page to use the latest geography data for these reports.)

- Assignments Preview

Within a territory proposal, you can preview how customers and current transactions would be reassigned resulting from the changes that you are making. This allows you to assess the business impact of these pending changes and identify mistakes before the changes are made effective. (Run Load and Activate from the Enable Dimensions and Metrics page to use the latest geography data and accounts for your assignment preview.)

Territory Administration: Explained

For many sales organizations, territory administration is a task that is performed on a daily basis to account for attrition or turnover of the sales force. In addition, major territory realignment resulting from sales reorganization or mergers and acquisitions can often take weeks, if not months, to implement. Using an intuitive user interface and bulk update capabilities, you can quickly and efficiently manage territory changes on an ongoing basis. This significantly reduces operational costs and increases business agility.

Intuitive User Interface

You can define territory assignment rules using flexible dimensional, inclusion, and exclusion coverage. This declarative approach of defining territories is more intuitive and suitable for business users such as sales operations staff. By contrast, many other Sales Force Automation applications require technical IT staff to write complex business rules or programs to make territory changes. This is time consuming and inefficient.

Bulk Territory Changes Using File Import and Export

To efficiently implement bulk territory changes resulting from major sales initiatives or reorganizations, you can leverage the round-trip file export and import capabilities. You can export current territory definitions into a file, update them using an off-line tool such as Microsoft Excel, and import the changes.

You can also leverage the same file import and export capabilities to migrate territory definitions from a test environment to a production environment. This ensures that the production environment is an exact replica of what has already been verified in the test environment after migration.

Delegated Administration

For large enterprise companies, the responsibility of territory administration is commonly decentralized by lines of business, divisions, or regions. This can be easily accomplished by adding the regional administrator to the territory team of the top-level territory corresponding to the scope of delegation. For example, if you add an administrator to the territory team of the top-level territory for North America Sales, then she can administer all the descendant territories under North America Sales. However, this administrator has no access to other territories, such as those in the European region.

Sales Features Supported by Territories

This topic highlights additional sales capabilities that are supported by territories. The following areas use territories:

- Forecasting
Sales Forecasting depends on having territories assigned to product items on opportunities. The forecast is then submitted and rolled up the management chain using the territory hierarchy.

- **Quota Allocation**
  You can distribute top-down quotas throughout your sales organization by leveraging the territory hierarchy. Use territory coverage and metrics to calculate quotas for sales resources based on current territory potential or past performance. This helps set more realistic and achievable quotas and allows for management by intrinsic data as opposed to opinions.

- **Intelligent Product Picker**
  Salespeople can become more productive when creating leads or opportunities in the application. The product picker automatically applies filters to only show those products that are defined in the coverage of the salesperson's territory.

- **Business Intelligence**
  A territory hierarchy and territory team can be fully leveraged in reporting and analytics. The territory hierarchy can be used as a dimension to aggregate data in building reports and key performance indicators based on your sales organization hierarchy.

## Implementing Territories

### Steps to Implement Territories

The following list of steps provides an overview of the tasks required to set up territories:

1. Prepare the data you will need to define your territories. If you plan to assign accounts directly to each territory, then you need customer data. Using dimensions for definitions requires the data for each dimension you plan to use.
2. Set the profile option that defines a default territory owner.
3. Use the Enable Dimensions and Metrics page to enable dimensions.
4. In the Additional Options region, you can choose to enable the following:
   - **Territory Precedence**
     Included accounts have priority over dimension coverage when assigning accounts to territories with the same territory function. If you don’t assign functions to territories, then included accounts have priority over all other territories. Enabling this option disables metrics, assignment preview, and territory validations.
   - **Assignment Preview**
     When you run Load and Activate after enabling this option, the customer data used to preview assignments for a territory proposal is synchronized from the source data.
   - **Territory Validations**
     Enable territory validations if you want to use the territory gaps and overlaps reports.
5. If you enable Territory Precedence and you want to assign functions to territories, then enter values for the Territory Function ORA_MOT_TERRITORY_FUNCTION lookup type.
6. Enable metrics that you want to see when comparing territory proposals.
7. Run Load and Activate to activate all of your settings and perform any data loading required according to your choices.
8. Schedule background processes.
9. Create your hierarchy of territories.

Populating Dimension Members: Explained

To be able to access dimension members when you define territories, you must populate dimension member data from source data for enabled dimensions. This is done using Oracle Business Intelligence Suite Enterprise Edition Plus. You must repopulate dimension members when source data changes, such as changes in the product catalog and the addition of new customers.

Cube

The cube provides metrics information for defined territories. The application generates the cube according to the enabled dimensions and their members. The application then loads the cube from the source data.

Prerequisite

The accounting calendar should be set up and the profile option CRM Common Calendar set. This calendar is used throughout Sales and controls the time periods for grouping metrics.

Sequence

Following is the sequence for setting up territory management:

1. Set up source data for the dimensions you plan to use. This includes:
   - Master geography and territory geography zone hierarchies
   - Sales catalog
   - Customer sizes lookup
   - Classification codes for the Organization Type classification category
   - Industry classification category and codes
   - Customer classification categories and codes for auxiliary dimensions

2. Enable the dimensions and metrics that you plan to use.

3. Load and activate the dimension members.
This figure shows the population of the dimension members data and the Oracle Essbase cube using the Repository Project Design (RPD) view from Business Intelligence.

### Setting the Territory Proposal Profile Option

The application generates territory proposals, for example when processing territory inheritance. Every proposal must have an owner. To provide an owner for generated territory proposals:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Territories
   - Task: Define Default Proposal Owner
2. Select a resource to be the default owner.
3. Save.

   This task sets the profile option MOT_DEFAULT_RESOURCE, Proposal Owner Default.

### Scheduling Territory Processes: Procedure

You can make changes to many territories at one time using a territory proposal. If you schedule proposals to become active on certain dates, then you must schedule a background process to run periodically to perform the activation.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Territories
   - Task: Run Territory Proposal Activation
2. To run the process immediately, click **Submit**.
3. Schedule the Run Territory Proposal Activation process. Click **Advanced**.
4. Select **Run Using a Schedule**.
5. For **Frequency**, select **Daily**.
6. Select start and end dates and times.
7. Go to the **Notification** tab.
8. Click **Create Notification**.
9. Enter the e-mail for the person who should receive notifications.
10. In the **Condition** field, you should select **On Warning** and **On Error** as a minimum.
11. Click **Submit**.

**Exposing the Exclusions Tab and Enable Forecasting Field:**

**Procedure**

You can modify the Territory Details UI to add the Exclusions tab and to add the Enable Forecasting field to the Summary tab. These changes affect the Less Details UI where sales managers can modify active territories without using a territory proposal.

**To create a sandbox:**

1. Sign in as a user with access to setups, or as an administrator.
2. Open the menu using the arrow next to your name and select **Manage Sandboxes**.
3. Create a new sandbox.
4. Make your sandbox active.

**To add the Exclusions tab to the Territory Details page:**

1. From the Navigator, open Application Composer.
2. Select the CRM Cloud application.
3. In Standard Objects, expand Sales Territory.
4. Select **Pages**.
5. In the Simplified Pages tab, Details Page Layouts region, select **Standard Layout**.
6. Click **Duplicate**.
7. Accept the provided name **Default custom layout**.
8. Save and close.
9. Click the link to open your new layout.
10. In the Subtabs region, click the **Hide, Show, or Reorder Subtabs** icon. The Configure Subtabs dialog appears.
11. Move **Exclusions** from the Available Subtabs list to the Selected Subtabs list.
12. Click **OK**.
13. Click **Done**.

**To enable the Enable Forecasting field:**

1. Open your Default custom layout for the Details Layout.
2. Click the Summary tab.
3. Click the **Edit** icon beside the Summary heading.
4. Move the **Enable Forecasting** field from the Available Fields list to the Selected Fields list.
5. Save and close.

**To activate your sandbox:**

1. Click your user image or name in the global header and click **Manage Sandboxes**.
2. Select to highlight the sandbox you created earlier.
3. Click **Publish**.
4. Click **OK**.
5. Navigate to the Details page for any territory, and you will see the Exclusions tab.

### Defining the Territories UI: Procedure

Profile options determine whether the landing page for territories is the More Details UI or the Less Details UI.

#### Defining the Landing Page

To define the landing page:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values

2. Search for the profile option code **FND_CLASSIC_INTERFACE**. This profile option enables access from the Navigator and springboard to the desktop pages when there are desktop and simplified versions of the same page. If not set, the default is the simplified version.

3. You can set this profile option at the site level or for individual users. Choose one of the following settings:
   - Yes: The landing page is the desktop UI.
   - No: The landing page is the simplified UI.

4. Search for the profile option code **MOT_DEFAULT_CLASSIC_INTERFACE**. This profile option is also accessed through the Manage Administrator Profile Values task.

5. Enter one of the following settings for this site-level profile option:
   - Y: The territories landing page is the More Details UI and users cannot access the Less Details UI used to directly change active territories.
   - N: The territories landing page is the Less Details UI and users can make changes directly to active territories. Users can also navigate back and forth between the More Details and the Fewer Details UIs.

### Configuring Prospects for Territory Assignment

Accounts, households, and contacts are maintained using Manage Customers. Only those accounts, households, and contacts that are the customer type are assigned to territories by default. But you can change your configuration to assign prospects or other types as well.

Perform the following steps to prepare prospects:

1. Use Manage Customers to add prospect data or you can import prospect data.
2. You can change a profile option to assign prospects as well as customers to territories. To change the profile option perform the following steps:
   - Only prospects that are part of a customer hierarchy are available for inclusion or exclusion when defining territories.
     a. Go to the Manage Customer Center Profile Options setup task.
     b. Select the profile option **ZCA_ASSIGNMENT_ACCT_TYPE_ENABLED**, Account Types Enabled for Assignment
c. Change the profile value to ZCA_CUSTOMER, ZCA_PROSPECT. Make sure you have no space between the two.

Territory Geography Grouping

Territory Geography Grouping Process

This topic describes how we can overcome the problem of territory geography splits by grouping them into group zones.

You do a territory geography grouping when any of your territory geography levels has multiple splits. A territory geography splits occur when the lower level master geographies are added to territory geography hierarchy, while skipping the higher level master geographies. This may cause multiple occurrences of the lower geography level members in a territory geography hierarchy.

For example, postal code split happens when a postal code overlaps across many master geography levels such as cities and counties. Suppose that the business firm Vision Corp. delivers its product according to the postal codes. If counties and cities are not included in the territory geography hierarchy of Vision Corp., then the end user can see the multiple occurrences of the postal code 97229.

When there is a territory geography level split, and if you want to group the split geographies, first you must specify the master geography level for which you want the grouping to be performed, then initiate grouping. When grouping is performed, all the splits of the selected master geography level get grouped under a new group zone. In the previous example, if you select postal code in the master geographies as the level for grouping and initiate the grouping process, then the 12 postal code splits for the postal code 97229 gets grouped together under one group zone named 97229. So, the Territory Manager user can define territories on a clean list of postal codes or their ranges, although some of those postal codes would in fact be the groupings of the postal code splits. The grouped splits are hidden for the Territory Manager user.

Managing Territory Geography Splits: Procedure

To manage territory geography level splits, you must group territory geographies into group zones. Grouping the territory geographies involves two steps, selecting the geography level based on which you need grouping and initiating the grouping.

Selecting the Geography Level for Grouping

Complete the following steps to select the geography level based on which you want to create the group zones:

1. Sign in as a set up user such as Application Implementation Consultant.
2. Navigate to the Setup and Maintenance > Manage Geographies.
3. Search for the country for which you want to enable territory geography level grouping.
5. Select the Subject to Grouping check box corresponding to the geography type level for which you want to enable grouping.

You must select the geography level that suits your business requirements. For example, if your product delivery is based on postal code, and your territory geographies do not have higher levels of master geographies such as counties and cities, then you may have postal code splits. In this case you must select postal code as the geography type level for grouping.

Note: You can enable grouping for only one level at a time.

6. Click Save and Close.
Initiating Grouping

Complete the following steps to initiate grouping:

1. Navigate to the setup and maintenance > Manage Territory Geographies task.
2. Click **Initiate Grouping**.
3. Click **OK** in response to the warning message and confirm the process.

> **Note:** You cannot automatically un-group the grouped territory geographies. You can manually undo the grouping process by recreating territory geography hierarchy either through the UI or import process.

When the grouping is complete, the geography level that you selected for grouping appears as an expandable Group Zone as shown in the following figure.

4. Click **Save and Close**.

Managing Territory Geographies: Worked Example

This example shows how to create a territory zone hierarchy using territory zone types, territory zones, and geographies. Create a territory zone type and a top level territory zone, then create more territory zones below the top level territory zone, and add geographies to the zones.

Creating a Zone Type and Zone

This example shows how to define a territory hierarchy with Pacific Northwest and Pacific West as sales regions. To start the configuration of the hierarchy, you must create a zone type and zone.

1. On the Manage Territory Geographies page, Zones Hierarchies region, click **Actions** and then **Add Zone**.
2. On the Add Zone page, click **Create New Zone Type**, and enter Country Sub Division in the **Zone Type** field.
3. Create your first zone under the Country Sub division zone type by completing the fields, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>West Coast Sales</td>
</tr>
<tr>
<td>Code</td>
<td>WEST_COAST</td>
</tr>
<tr>
<td>Start Date</td>
<td>1/1/11</td>
</tr>
</tbody>
</table>

4. Click **Submit**.
Creating Zones Below Another Zone in the Hierarchy
This example shows how to create two territory zones below the West Coast Sales zone.

1. On the Manage Territory Geographies page, Zones Hierarchies region, select the West Coast Sales zone that you have just created.
2. Click Actions, and then Add Zone.
3. On the Add Zone page, click Create New Zone Type, and enter Country Sub Division Regions in the Zone Type field.
4. Create a new zone by completing the fields, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Pacific Northwest Sales</td>
</tr>
<tr>
<td>Code</td>
<td>PAC_NW</td>
</tr>
<tr>
<td>Start Date</td>
<td>1/1/11</td>
</tr>
</tbody>
</table>

5. Click Submit.
6. On the Manage Territory Geographies page, Zones Hierarchies region, select the West Coast Sales zone again.
7. Click Actions and then Add Zone.
8. Click the Use Existing Zone Type option, and select the Country Sub Division Regions zone type.
9. Complete the fields, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Pacific West Sales</td>
</tr>
<tr>
<td>Code</td>
<td>PAC_W</td>
</tr>
<tr>
<td>Start Date</td>
<td>1/1/11</td>
</tr>
</tbody>
</table>

10. Click Submit.

Adding Geographies to a Zone
This example shows how to add geographical boundaries to the Pacific West Sales zone.

1. On the Manage Territory Geographies page, Zones Hierarchies region, select the Pacific West Sales zone.
2. Click Actions and then Add Geography.
3. On the Add Geography page, enter United States in the Country field, and then click Search.
4. On the Add Geography page, enter CA in the State field, and then click Search.
5. Select CA, and click OK.
6. Click Submit.
7. On the Confirmation window, select Add geography only, and then click OK.
8. Repeat steps 1 to 7 to add more geographies to the Pacific West Sales zone and Pacific Northwest Sales zone.
Preparing Territory Dimensions

Territory Dimensions Setup: Explained

Dimensions are attributes that define jurisdictional boundaries of territories. For example, you can use the geography dimension to define territories by country or postal code. Every customer that falls within the defined geography is assigned to the territory and to the sales team for that territory. You assign customers, partners, leads, and opportunity items to the correct territories using dimensions. All dimension values combine to define the territory boundaries. For example, if Geography is set to United States and Customer Size is set to Large, then the territory will be assigned to only large customers within the United States.

Customer and Partner Inclusions

By default, you can define territories by selecting customers or partners to be included in the territory. Customers and partners are available to select from Customer Data Management for inclusions and exclusions. When a merge action eliminates duplicate records, one record can be replaced by another. If a customer included in or excluded from a territory is changed through the merge process, then the new customer record automatically replaces the old record in the territory.

Dimensions

You must enable dimensions before you can use them to define territories. The dimensions available to assign customers or partners to a territory are:

- Geography
- Account Type
  
  The account type specifies if a customer is a named account or not.
- Customer Size
- Industry
- Organization Type
- Additional dimensions based on selected classification categories to match specific customer or partner information

A territory assigned to a customer or partner will also be assigned to the corresponding leads and opportunities. The following additional dimensions are available to define boundaries specifically for leads and opportunity items:

- Business Unit
- Product
  
  Product groups and products form a hierarchy in the sales catalog.
- Sales Channel
  
  The available sales channels are Direct, Indirect, and Partner.

You must enable each dimension that the sales organization plans to use for automatically assigning territories to customers, partners, leads, or opportunity items. All dimensions except account type require some preparation before you enable and use them.
Dimensions You Can Modify

The following dimensions are ready to use but can be modified:

- **Customer Size**
  
  You can change the provided customer sizes within the **Organization Size** lookup type.

- **Industry**
  
  The industry hierarchy is from the customer classification module. When you enable the Industry dimension in Enable Dimensions and Metrics, you must also select the classification category that you want to use. The available selections include only classification categories belonging to the Industrial Categories grouping. Your selection modifies the profile option Industry Classification Category.

  You can assign primary and nonprimary industry values to accounts. When an account is assigned multiple classification values, for the purposes of territory and rule-based assignment, the assignment engine can use all of the values or only the primary account classification. Opportunity assignment also supports multiple classification values. For more information on assigning accounts using industry classification codes, see the white paper, Industry Classification and Opportunity Assignment (Doc ID 2086014.1) available on My Oracle Support.

- **Organization Type**
  
  To change the available organization types, edit the Organization Type category using the Manage Classification Categories task in the Setup and Maintenance work area. You can assign primary and nonprimary organization type values to accounts. When an account is assigned multiple classification values, for the purposes of territory and rule-based assignment, the assignment engine can use all of the values or only the primary account classification. Opportunity assignment also supports multiple classification values. For more information on assigning accounts using industry classification codes, see the white paper, Industry Classification and Opportunity Assignment (Doc ID 2086014.1) available on My Oracle Support.

- **Sales Channel**
  
  You can add additional channels under the Partner sales channel.

Dimensions Requiring Preparation

See related topics to find out how to prepare the following dimensions:

- **Business Unit**
- **Geography**
- **Product**
- **Additional Dimensions**

**Related Topics**

- **Multiple Business Units in Sales: Overview**

Preparing the Geography Dimension: Explained

If you plan to assign any objects to territories using addresses, then you must provide geography data for the Geography dimension members. The source master geography data is also used outside of territory definitions, such as for customer address validation. The same geography hierarchy is used for all applications.
The following steps implement existing geography data for use in the Geography dimension:

1. Go to the **Manage Geographies** setup task. For every geography level that you intend to use, switch on validation by checking the appropriate check box. Also set up the country validation level to **Error**.

   **Note:** If you have already created addresses before setting up geography validation for a country, then you must execute the Run Maintain Geography Name Referencing task for that country after enabling geography validation to ensure that all your geography elements are validated.

2. You must build one or more territory geography hierarchies using the **Manage Territory Geographies** setup task. You use geography elements from the master geography data to form your hierarchy. The hierarchies created in this step become geography dimension members available for defining territories.

   Using zones is an optional feature of territory geographies. You can create a zone that is a parent of one or more master geographies. For example, you can create an Americas zone that includes several countries. The Americas zone becomes a dimension member that can be selected for defining a territory. Before you create zones, make sure all of your sales organizations agree with the definition of each zone.

3. Go to the **Enable Dimensions and Metrics** territory setup task.
4. Click **Geography** to the enabled dimensions.
5. Click **Load and Activate** to enable geographies.

   A process also loads dimension member data for other enabled dimensions.

6. It is a good practice to run full reassignment processes for customers, leads, and opportunities after updating Geography dimension members in the previous step.

When changes occur in geography data, the changes are immediately available for territory definitions. Synchronization is not necessary.

### Synchronizing Geography Data

When you define territories, you select geography data from the source geography hierarchy. The following features require geography data that is synchronized and resides in territory tables.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Territory gap report</td>
<td>1. Select the <strong>Enable territory validations</strong> option.</td>
</tr>
<tr>
<td></td>
<td>2. Run Load and Activate, or perform the Run Territory Dimension Synchronization task to update the geography data used in detecting gaps.</td>
</tr>
<tr>
<td>Territory overlap report</td>
<td>1. Select the <strong>Enable territory validations</strong> option.</td>
</tr>
<tr>
<td></td>
<td>2. Run Load and Activate, or perform the Run Territory Dimension Synchronization task to update the geography data used in detecting overlaps.</td>
</tr>
<tr>
<td>Customer assignment preview</td>
<td>1. Select the <strong>Enable customer assignment preview</strong> option.</td>
</tr>
<tr>
<td></td>
<td>2. Run Load and Activate, or perform the Run Territory Dimension Synchronization task to update the accounts and geography data used in previewing customer assignments.</td>
</tr>
</tbody>
</table>

Additional details about setting up geography data are available in Customer Data Management guides.

**Related Topics**

- Setting Up Geography Data: Overview
- Managing Geography Structures, Hierarchies, and Validation: Worked Example
Preparing the Product Dimension: Explained

The Product dimension captures leads and opportunity line items to assign them to territories. You create a hierarchy of products and product groups in the sales catalog before enabling the Product dimension.

Salespeople can select the products or product groups when creating leads or opportunities. When you include a product group in a territory coverage, the territory then captures leads and opportunity line items containing a product within the hierarchy of the selected product group.

Tip: It is a good practice to initially set up your sales catalog using product groups, and then add individual products or inventory items if needed.

Perform the following steps to prepare the Product dimension:

1. Go to the Manage Product Groups setup task.
2. Create your root product group with the following settings:
   o Active
   o Root Catalog
   o Locked
   o Allow Duplicate Children is deselected
3. Use the Subgroups tab to create product groups within the root catalog. You can create a hierarchy of product groups.
4. Publish your sales catalog.
5. Use the Manage Product Group Usage setup task to add your root product group as the Base usage.
6. Go to the Enable Dimensions and Metrics territory setup task.
7. Add Product to the enabled dimensions.
8. Click Load and Activate to start the background process. The process loads the sales catalog data to become dimension members available for selection when defining territories. The process also loads dimension member data for other enabled dimensions.
9. When changes occur in the sales catalog, you must again run the Load and Activate process to update the Product territory dimension member data. You can perform the maintenance task Run Territory Dimension Synchronization to schedule the Load and Activate process.
10. It is a good practice to run full reassignment processes for leads and opportunities after updating Product dimension members in the previous step.

Related Topics
- Creating the Sales Catalog: Getting Started
- Creating a Sales Catalog: Worked Example
Creating Auxiliary Territory Dimensions

Dimension Parameters: Explained
Use parameters to refine the definition of each dimension so it best fits business requirements.

Three dimensions use parameters:
- Industry
- Time
- Product

Industry
Use the parameter to set the number of levels in the industry hierarchy that display in the dimension member selection screen.

Time
Set the start of the time period used in calculating metrics using the Calendar Start parameter. Set the number of years prior to today’s date when the calendar starts for metrics.

Product
Use the parameter to set the number of levels in the product hierarchy that display in the dimension member selection screen.

Video

Watch: This video tutorial shows you how to create a classification category, associate it with an auxiliary territory dimension, and activate the account mapping for the dimension. The content of this video is also covered in text topics.

Procedure
You can create up to three additional dimensions that will match with customer attributes.

Defining Auxiliary Dimension 1, 2, or 3
You can define up to three customer auxiliary dimensions based on the customer classification model. Define classification categories first and associate them to the Customer Categories grouping.

The following steps must be done before you can enable auxiliary dimensions:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Territories
   - Task: Manage Classification Categories

2. Create a new classification category. You can allow parent code assignment. If you allow multiple class code assignments, then the classification that is designated as Primary in the customer record is the one that is matched to assign the customer to a territory.

3. Add classification codes for the new category. You can form a hierarchy with the codes or not.

4. Use the Manage Classification Groups task and search for the CUSTOMER_GROUP category group code. Edit the group and add your new classification category to the group.
5. Add an auxiliary customer dimension in **Enable Dimensions and Metrics** and select the correct classification category that you created. Then this classification category becomes the source for dimension members for the auxiliary dimension.

6. Load and activate your newly enabled dimensions.

**Setting Assignment Mapping**

To enable the dimension for territory assignment to accounts:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Accounts and Contacts
   - Task: Manage Customer Center Assignment Objects

2. Select **Account**.
3. Click the **Candidates** tab.
4. Select **Account Territory**.
5. Click the **Account Territory: Mapping Sets** tab.
6. Select **Mapping Set 1**.
7. Find the auxiliary dimension you want to use, such as **Auxiliary Dimension 1**.
8. Click **Edit**.
9. Deselect **Inactive**.
10. Click **OK**.
11. Click **Save and Publish**.

**Related Topics**

- Setting Up Fields for Classifications Used in Territory Assignment

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**Creating the Territory Hierarchy**

**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.

<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 Manage Proposals button you can create territory proposals with your territory changes.</td>
</tr>
<tr>
<td>4</td>
<td>The Show Dimensions button displays dimension details in the list of active territories.</td>
</tr>
<tr>
<td>5</td>
<td>The Show Metrics button displays metrics details in the list of active territories.</td>
</tr>
<tr>
<td>6</td>
<td>The Fewer Details 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 effecting 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>
<tr>
<td>Feature</td>
<td>More Details UI</td>
<td>Fewer Details UI</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>go live in the future, to account for seasonal sales demands, for example.</td>
<td>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.</td>
</tr>
<tr>
<td>Inheriting the properties of parent territories</td>
<td>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.</td>
<td></td>
</tr>
<tr>
<td>Importing territories</td>
<td>Territories you import appear in a territory proposal, which you must activate.</td>
<td>Import is not supported.</td>
</tr>
</tbody>
</table>

**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

**When does a territory administrator define territories?**

Sales managers define territories because they have the knowledge about their assigned territory and about their salespeople, and are best able to assign territories equitably. Sales managers delegate the territory definition activity to sales operations to save time. Create an administrator who can modify all territories and quotas by giving her the Sales Administrator job role. Or select the Administrator check box for a territory team member in your territory. This person must also have a job role that includes the Territory Management Administration Duty. Now that person can view your territory and modify all territories lower in your territory hierarchy. He can also assign sales quotas for you.

**Territory Proposals: Explained**

Territories are used to assign teams to leads, opportunity items, and customers. A territory proposal is a container used to model and explore territory definitions without affecting active territories. Activate a proposal to update the existing territory definitions.

**Typical Territory Proposal Workflow**

The following table shows a typical workflow for territory proposals.
<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a proposal</td>
<td>Create the proposal and set an activation date.</td>
</tr>
<tr>
<td>Add a territory to the proposal</td>
<td>Add an existing territory to the proposal, or create a new territory. Repeat for additional territories.</td>
</tr>
<tr>
<td>Define coverage</td>
<td>Select attributes to define the boundaries of each territory.</td>
</tr>
<tr>
<td>Select the territory team</td>
<td>Every territory must have an owner and can have additional team members.</td>
</tr>
<tr>
<td>Analyze and compare proposals</td>
<td>Review metrics and graphs to analyze proposals for such things as number of customers and amount of closed opportunity revenue in each territory.</td>
</tr>
<tr>
<td>Preview territory assignments</td>
<td>Preview assignments of customers, revenue, and leads for a proposed territory.</td>
</tr>
<tr>
<td>Activate the proposal</td>
<td>Activate a proposal. The proposal remains in pending activation status until the activation date is reached. You can reopen and update the proposal until then.</td>
</tr>
<tr>
<td>Run reassignment processes</td>
<td>Reassignment processes are scheduled to run periodically.</td>
</tr>
</tbody>
</table>

Creating the Territory Hierarchy Using Proposals: Procedure

You create one territory hierarchy starting with a single top territory. Use the territory proposal to create many territories at one time.

Creating a Proposal

Perform the following steps to create a proposal:

1. While signed in as a setup user, open the task **Manage Territory Proposals** from 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 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.
3. Enter the resource who is the owner of the top territory, 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**. This is the setting you want for your master catchall territory. You are now ready to add the rest of the territory hierarchy.

**Adding the Rest of the Hierarchy**

Add the rest of the sales territory hierarchy from the top down as follows:

1. In Manage Territory Proposals page, select the name of your proposal. The territory proposal opens for editing.
2. Select the parent territory in the Territories table.
3. Click **Create Child of Selected Territory** (the plus sign icon). The Create Territory page appears.
4. Enter the territory name.
5. Enter the owner for the territory.
6. Select the territory type, either **Prime** or **Overlay**.
7. If Territory Precedence is enabled, you can select a territory function. Assignment compares all territories with the same function and gives precedence to the territories with included accounts.
8. From the **Enable Forecasting** list, select **Prime**, **Overlay**, or **Prime and Overlay** depending on the territory you are setting up. For managers of both prime and overlay territories, select **Prime and Overlay** so that the managers can adjust forecasts of all their subordinates. Select **Disabled** to remove the territory from forecasting.
9. Click **Save and Close**. You are returned to the Territory Proposal window. You are now ready to specify the coverage for the territory.
Defining the Territory Coverage
Perform the following steps to edit the territory coverage. When you create a child territory, it automatically inherits the coverage of its parent.

1. In Manage Territory Proposals page, select the name of your proposal.
   The proposal opens for viewing.
2. In the Territories table, select the territory you want to change.
3. Click the Coverages tab in the Details region of the page.
4. Click Edit (the pencil icon) in the Dimensional Coverage region of the tab.
   The Edit Coverage page appears.
5. For every dimension you want to change:
   a. Select the dimension from the Dimensions list.
   b. Add or remove dimension members from 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.
6. Click Save and Close.
   You are returned to the Territory Proposal page. When you have completed adding territories and specifying coverage, you are ready to activate your territory proposal.
7. To include specified customers:
   a. Click Select and Add.
   b. Search for and select a customer.
   c. You can click Save and Apply to search for and select another.
   d. Click Save and Close.
8. To exclude specified customers, repeat step 7 in the Excluded Customers region.

Creating the Territory Hierarchy One Territory at a Time: Procedure
You can build your active territory hierarchy starting by creating the one top territory. You then add one child territory at a time to a parent territory. When you save a new territory, it immediately becomes active.

To create the top territory:
1. Sign in as a setup user.
2. Navigate to Territories. There are no territories listed on the page.
3. Click Create Territory.
4. Enter the territory name.
5. Select an owner for the top territory, most likely the VP of Sales.
   The owner appears on the Team Members tab. You can add additional members to the team, and the owner himself can add members later.
6. From the territory Type list, select Prime and Overlay.
When you select Prime and Overlay, descendant territories can be Prime Only, Overlay Only, or both.

7. 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. Your administrator enables the Enable Forecasting field using Application Composer, otherwise it is hidden.

8. Click Save and Continue.

9. Click the Dimensions tab.

10. Save and close.

To add child territories:

1. Select from your territories list the territory that will be the parent to your new territory.
2. Go to the Hierarchy tab.
3. Click Create Territory.
4. Enter the territory name.
5. Select the owner for the territory.
6. If Territory Precedence is enabled, you can select a territory function. Assignment compares all territories with the same function and gives precedence to the territories with included accounts.
7. Click Save and Continue.
8. Go to the Dimensions tab.
9. To change dimension definitions, click Edit.
10. Select a dimension and move the values you want to the Selected column.
11. Optionally, click Edit and enter several members or ranges of members separated by commas and click OK.
12. Click OK.
13. To add an account, select the Inclusions tab.
14. Click Add Customers and select Accounts.
15. Use the Exclusions tab to select customers to be excluded from the territory. (Use Application Composer to enable the Exclusions tab.)
16. Use the Team Members tab to add members to the territory team.
17. When you complete making all changes, click Save and Close.

Your new territory is now active.

Territory Proposal Statuses: Explained

A territory proposal contains definitions for territories. It progresses through different statuses in its life cycle. The following table describes proposal statuses.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>The proposal is first created, and different users can participate to make changes to their child territories.</td>
</tr>
<tr>
<td>Pending Activation</td>
<td>The owner requests that the proposal be activated. The proposal is in pending activation status until the activation date.</td>
</tr>
<tr>
<td>Activated</td>
<td>After the owner requested activation and the activation date is reached the proposal is activated and the territories become active.</td>
</tr>
</tbody>
</table>
### Status and Description

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Processing</td>
<td>Restoring a hierarchy to an historical definition starts a process to identify changes needed in the proposal.</td>
</tr>
<tr>
<td>Failed</td>
<td>Any changes introduced to territories as part of this proposal are not made.</td>
</tr>
</tbody>
</table>

### Territory Proposal Rules: Explained

Use territory proposals to explore and evaluate new territory definitions.

Keep these rules in mind:

- Only one definition for a territory can be active at a time.
- You can freely create, edit, and delete territories within a proposal without affecting active territory definitions.
- A territory owner can update a proposal with changes to a subordinate’s territory.
- If a given territory is updated in two different proposals, and both of them get activated, the changes of the proposal that’s latest to get activated will override the changes in the other proposal. A territory that is added to territory proposal A, but then deleted from proposal B which gets activated first, is reinstated when proposal A is activated.
- If a proposal contains territories added to a parent territory that is now deleted, the new territories are deleted during proposal activation.
- A maximum of 500 territories can be children of the same parent territory.

### What’s a territory overlap?

When two or more territories are children of the same parent, and reference the same intersection of dimension members, then the territories overlap.

The Overlap report only lists overlaps where the overlapping territories are children of the same parent territory. For example, a child territory with the dimension member Virginia and a child territory with the dimension member United States overlap. Only dimension members from the last full synchronization are used for the overlap report. Performing a Load and Activate in Enable Dimensions and Metrics synchronizes dimensions. Geographies are synchronized if you select the Enable territory validations option and then perform Load and Activate.

An overlap is a problem if it is accidental. If it results in two salespeople mistakenly assigned the same area, the overlap causes conflicts and incorrectly assigned sales quotas.

A deliberate overlap is useful for assigning additional salespeople or technical experts to the same areas also covered by the salespeople who have quotas. For example, the same area requires four salespeople with separate territories, but only one technical expert. It is a good practice to assign one of the territories the territory type of Overlay.

### What’s a territory gap?

A territory gap consists of a dimension member that belongs to a territory but does not belong to any children of that territory.
In this graphic the parent territory is defined by the size of the customer, and the available dimension members for customer size are small, medium, and large. There are child territories for small and medium sized customers, but the territory for large customers is missing and creates a gap.

Only dimension members from the last full synchronization are used for the gap report. Performing a Load and Activate in Enable Dimensions and Metrics synchronizes dimensions. Geographies are synchronized if you select the Enable territory validations option and then perform Load and Activate.

What happens if I select Forecast not visible to territory owner?

The territory is hidden in the Forecasting Overview page, but is available on the Edit Forecast page. The owner of the parent territory can submit the forecast for the child territory. If the child territory owner also owns the parent territory, then the territory owner can edit forecast items, add and remove forecast items as adjustments, and adjust the territory forecast.

Use Analytics to Test Territory Proposals: Examples

View graphs to compare your proposed territory changes to existing active territories to determine if your proposal achieves the goals you set. Will the new territories be more equitable and productive? Also, evaluate territory changes in multiple proposals, or see the results of territory changes made within a single proposal.

Scenario

You want to see how much the number of customers changed between the proposed territory version with new geographic boundaries and the active version. You select the territory and choose the Number of Customers metric for the current quarter and Version Comparison, Active Version Comparison. You see significantly more customers in your proposed territory.

Next you compare all child territories of the selected territory and see that only one child has a significant change in the number of customers and you determine that you need to realign the child territories.
Territory Coverage

Territory Coverage: Explained

A territory defines who will sell what to whom. It specifies the boundaries of a coverage area. You define boundaries using dimensions and criteria, not by specifying procedural rules.

You define a coverage area using the following:

- **Dimensions**
  
  Values that define what to include in the territory using categories such as geography, product, industry, and so on.

- **Inclusion Criteria**
  
  A list of specific customers or partners, whether or not they meet the dimensional definition. These customers do not have to be designated as Named accounts.
  
  - **Customer Hierarchy:** You can choose to include the customer hierarchy for the selected customer. All customers for the selected customer hierarchy will be assigned to the territory.
  
  - **Filtering Conditions:** Defined dimensions apply to the included customers and their hierarchies so that only customers that match the dimension definitions get assigned to the territory.
  
  - **Other Dimensions:** Product or sales channel dimensions defined for all of the included customers or partners.

- **Exclusion Criteria**
  
  A list of specific excluded customers or partners to be omitted from the territory whether or not they meet dimension definitions. These customers do not have to be designated as Named accounts to be excluded. You can choose to also exclude the customer hierarchy for the selected customer.

- **Overrides:** A way to override what is inherited from a source territory.

**Note:** We recommend full reassignment to be scheduled for each object. The frequency of this schedule can be different from one object to another, depending on requirements.

Territory Coverage for Partners

A partner is an organization party with a partner profile associated and an assigned Partner usage. Partners are defined in the Partner Center.

Similar to direct sales, channel managers have corresponding sales territories pertaining to partner sales activities. Some channel managers are assigned to specific partners. Some channel managers are assigned to customers for sales activities that involve partners. Channel manager territories can be defined by the following coverage models.

- **Coverage Defined by End Customer Characteristics (Customer-Centric)**

  Define the coverage using the characteristics of the end customer, and specific inclusions and exclusions. As an example, a channel manager is assigned to cover all the indirect opportunities where the end customer is located in California.

- **Coverage Defined by Partner Characteristics (Partner-Centric)**
Coverage is defined using the following attributes of a partner organization:

- Primary geographical location of the partner
- Organization Type of the partner (for example, private, public, government owned, nonprofit)
- Industries served by the partner (for example, high tech, manufacturing, banking, pharmaceutical)
- Size of the partner
- Three auxiliary dimensions are available for partners based on the customer categories classification model

- Individually Selected Partners

Select partners to directly assign to or exclude from a partner-centric territory. As an example, a channel manager is assigned to a partner named AA Solutions. This channel manager will be assigned to all indirect opportunities where AA Solutions is the partner. The opportunities for included partners can be additionally qualified by product and sales channel.

Territories with No Coverage

You can create a territory that has no coverage by clicking Remove All under Edit on the Dimensions tab. The dimensions have a blank coverage, rather than the value Any. The territory is indirectly defined by the coverage of its descendant territories. You can assign quota to the territory and it can participate in forecasting. The territory cannot be automatically assigned to customers, leads, and opportunities, but you can see the assignments of its descendant territories. You can also assign the territory to an opportunity item manually.

Precedence During Assignment

When you include a customer in the coverage for a territory, that customer is also assigned to any territory with matching dimension coverage. If you don’t want the customer to be assigned to both, then one solution is to add the customer as an exclusion from the second territory. Another solution is to enable territory precedence so that assignment automatically assigns the customer only to the territory with the inclusion coverage.

You can limit the automatic exclusion to the territories identified as belonging to the same group. For example, a primary salesperson Z has exclusive ownership of ABC Corporation, in Arizona. However, your product specialist team should also be assigned to ABC Corporation using dimension definitions. Use the Territory Function field to identify each territory with a function to group them.

In this example, the territories are defined by the following:

- The primary salesperson A’s territory is defined with the Primary function.
- The coverage for A’s territory is defined by geography, including Arizona.
- The primary salesperson Z’s territory is identified with the Primary function.
- The coverage for Z’s territory contains ABC Corporation in Inclusions.
- The product specialist’s territory is identified with the Technical Specialist function.
- The product specialist’s territory is defined by geography, including Arizona.

The example territory assignment is the following:

- ABC Corporation belongs to primary salesperson Z because the account inclusion takes precedence.
- ABC Corporation is not assigned to Salesperson A’s primary territory because the inclusion territory takes precedence over the territory defined by geography.
- ABC Corporation is assigned to a Technical Specialist territory that covers Arizona.
 Territory Coverage: Examples

A territory coverage is a set of boundaries that define what is included or excluded in the territory and what can be sold. Dimensional coverage consists of the combination of one or more territory dimensions. You can select individual customers (with or without a hierarchy) or partners to include or exclude from the territory in spite of dimension selections. The following scenarios illustrate using different coverages.

Geography Territories with Customer Inclusion and Exclusion

Two salespeople cover all customers in separate geographic areas, Texas and California. Tom owns the Texas territory, and Sue has California. Sue has a special relationship with the A1 customer located in Texas. The solution is to add A1 as a customer inclusion to Sue’s territory and as a customer exclusion in Tom’s territory.

The following figure shows Sue’s and Tom’s territories.

Define Individual Customers Only

Salespeople sell to ten to twenty individually assigned customers. You do not define a dimensional coverage, but manually assign the customers as inclusions.

Key Accounts with Subsidiaries

A Key Account Director is responsible for a few strategic accounts (named accounts) and all subsidiaries of the strategic accounts. You select each strategic account as an included customer, and choose to also include the hierarchy for each.

Forecasting Using a Parent Territory

You own an overlay territory that inherits coverages from several other territories. Create a parent territory with all the inheriting territories as children. The parent has no coverage except the coverages inherited by its children. You can designate each child territory as Forecast not visible to territory owner, and then perform all your forecasting activities for the inherited territories using the parent territory.

Parent Territory with No Coverage

The territories for your sales managers do not require boundary definitions separate from the territory definitions of their salespeople. Create a parent territory with no defined coverage for the manager. The managers can view and update the territories for their groups, have access to their transactions, and can forecast sales for the group.
The following figure shows the manager’s territory with no defined coverage as the parent territory of 3 salespeople’s territories. The salespeople’s territories are defined by geography and selected customers.

![Territory Diagram]

What’s a line of business?

A line of business is a category for particular kinds of commercial enterprise. Modify a territory by selecting one or more lines of business for that territory. For example, during implementation a software company uses a broad categorization of products for lines of business and adds education, licenses, and consulting to their selection list for line of business.

Source and Recipient Territories: How They Work Together

Sometimes organizations (for example, an industry overlay organization) shadow the prime sales organization. In this scenario, a shadowing territory’s coverage should change whenever the corresponding prime territory changes, with the exception of one or two dimensions, which become overrides.

Source and Recipient Territories

Create one territory as the source and let the shadowing territories inherit the dimension definitions from the one source. Then you only make changes in the one source territory, and the rest of the territories inherit the change. This is an easy way to keep dimension definitions synchronized for a number of territories.
In the following figure, the product dimension in the source territory changes from laptops to computers. The recipient territories automatically change to the product computers.

Customer or partner inclusions and exclusions can also be inherited. The source and recipient territories can have different territory owners and can be placed in different hierarchies.

Creating a Territory Inheritance: Procedure

You can set a territory as the source for the definitions of another territory. Then you only make changes in the one source territory, and the rest of the territories inherit the change. Use the following procedure to start a territory inheritance:

1. Add a territory to a territory proposal to edit.
2. From the Actions menu, choose **Edit Inheritance**.
3. Select the territory that contains coverages (dimensions or inclusions and exclusions, or both) that you want your proposed territory to inherit. Your territory inherits all coverage information from this source territory, unless you use overrides to change the coverage in the recipient. You can't have a chain of territory inheritances where territory B inherits from territory A, and B also is a source territory for territory C.

   **Caution:** If you delete a source territory, then automated updates to recipient territories cease.

4. Use overrides to modify what is inherited from the source.
5. Add any additional coverage definitions to your proposed territory.
6. Activate your territory proposal.

   Recipient territories also inherit the Eligible for Quota, Revise Quota, Revision Reason, and Revision Description settings from the source territory.
Changing and Ending Inheritance

After you make changes to a source territory, use the Update Recipients action in the Territories table on the proposal to start the Territory Inheritance Recipient Update background process to update the recipient territories.

You can change the source territory to none to end the automatic inheritance of territory definitions.

Creating Geographic Territories: Examples

A common method of dividing sales territories is by geography. Following are examples of assigning territories by geography.

Countries

You have a small sales team and sell products internationally by phone. All salespeople have the expertise to sell all products to all customers. You choose to define territories by country. There are too many customers in the United States for one salesperson, so you create territories for different states that have a parent territory for the country. You group several small countries by creating a parent zone in the geography hierarchy.

Postal Codes

Your company sells mostly through on-site visits to companies in a few major cities in North America and Europe. To service city customers adequately, you must assign several salespeople to each city. You choose to create territories defined by postal codes that form hierarchies with their parent territories, defined by country. Customers with locations that are not within the assigned postal codes get assigned to the parent country territory.

Using Dimensional Coverage: Examples

The sales administrator enables only the dimensions the organization requires for defining territories. The following examples illustrate the use of different dimensions to assign customers, leads, and opportunities to the correct salespeople using defined territories.

Geography

For most of your sales activities, you want to assign salespeople by state and postal code.

Account Type

You want to assign major customers to Named accounts territories. A named account territory can have child territories identified by additional criteria, such as geography. You also have territories with the account type of Not Named that include no major named accounts in the hierarchy.

Customer Size

One product line is suitable only for organizations above a certain size. Use the customer size dimension to target only the larger customers for the product line.

Industry

You sell one type of service to telecommunications companies, another service to utilities, and a third service for insurance companies. You can create territories for each using the Industry dimension.
Product
You sell a product line that requires salespeople to have a high degree of technical knowledge. Create separate territories for this product line.

Sales Channel
You delegate customers that are small to partner sales organizations by geography.

Creating Territories Using Multiple Dimensions: Examples
The following scenario illustrates using a combination of different dimensions to define a new hierarchy of territories.

Scenario
The telescope division of your company manufactures and sells a special type of microscope as well as related accessories and supplies. You currently sell mostly to medical laboratories throughout the United States, with a few sales to other industries. Your company recently started supplying microscopes to two large universities and several colleges in the East. Management wants to focus on expanding this new market by dedicating several salespeople to this industry, and by assigning individual universities to territories.

The following figure shows the current territory hierarchy for the division, divided into East and West United States with a parent territory to catch any accounts that are not identified as being within the United States. All territories for the Telescopes Division of the company include in the definition the product group: telescopes, accessories, and supplies.

Selling telescopes requires salespeople with more knowledge and experience. Therefore, you separate telescope sales from sales of accessories and supplies within each US region, as shown in the following figure. To accomplish this, you define the Telescopes territories with the Telescopes product and the Telescopes Supplies territories with the Telescope Supplies and Accessories product group.
Dimensions for the Telescopes East territory are:

- Geography: East United States
- Product: Telescopes
- Industry: Any

Dimensions for the Telescope Supplies East territory are:

- Geography: East United States
- Product: Telescope Accessories and Supplies
- Industry: Any

You add two child territories defined by Industry dimension members for 4 year colleges and universities, and 2 year colleges, as shown in the following figure. Within the 4 year colleges and universities territory, you add the two universities who are current customers as inclusions so they will have dedicated salespeople to service them.
Dimensions for the Colleges and Universities East territory are:

- Geography: East United States
- Product: Telescopes
- Industry: Colleges and Universities - 4 year

Dimensions for the Community Colleges East territory are:

- Geography: East United States
- Product: Telescopes
- Industry: Community Colleges - 2 year

Dimensions for each university territory are:

- Included Customer: Harvard (for the Harvard territory)
- Included Customer: Cornell (for the Cornell territory)
- Other Dimensions, Product: Telescopes

You build the West United States territory hierarchy in the same way, as illustrated in the following figure. Sales management identified three universities as named accounts even though they haven’t yet purchased telescopes.
Inherited Territory Coverage: Examples

Use territory inheritance to make coverage changes to one source territory and automatically propagate those changes to recipient territories that have an inheritance relationship to the source territory. Use overrides to change the dimensional coverage and other dimension information, and to qualify the included customers and their hierarchies to only those that match the override information.

In this example, three dimensions are enabled: geography, industry, and product. The following table provides the source territory definition.

<table>
<thead>
<tr>
<th>Coverage Type</th>
<th>Definition</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dimensional Coverage</td>
<td>Geography</td>
<td>Europe</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Industry</td>
<td>Any</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Product</td>
<td>Any</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer A</td>
<td>Is in the high tech industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer B</td>
<td>Is in the services industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer C</td>
<td>Is in the utilities industry</td>
</tr>
<tr>
<td>Filtering Conditions</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Other Dimensions</td>
<td>Product</td>
<td>Desktops, Laptops</td>
</tr>
</tbody>
</table>
Recipient Territory 1
The override for recipient territory 1 is Industry: Services.
The following table show the resulting coverage for recipient territory 1.

<table>
<thead>
<tr>
<th>Coverage Type</th>
<th>Definition</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dimensional Coverage</td>
<td>Industry</td>
<td>Services</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Geography</td>
<td>Europe</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Product</td>
<td>Any</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer A</td>
<td>Is in the high tech industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer B</td>
<td>Is in the services industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer C</td>
<td>Is in the utilities industry</td>
</tr>
<tr>
<td>Filtering Conditions</td>
<td>Industry</td>
<td>Services: Filters out Customers A and C</td>
</tr>
<tr>
<td>Other Dimensions</td>
<td>Product</td>
<td>Desktops, Laptops</td>
</tr>
</tbody>
</table>

Recipient Territory 2
The override for recipient territory 2 is Industry: High Tech.
The following table show the resulting coverage for recipient territory 2.

<table>
<thead>
<tr>
<th>Coverage Type</th>
<th>Definition</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dimensional Coverage</td>
<td>Geography</td>
<td>Europe</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Industry</td>
<td>High Tech</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Product</td>
<td>Any</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer A</td>
<td>Is in the high tech industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer B</td>
<td>Is in the services industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer C</td>
<td>Is in the utilities industry</td>
</tr>
</tbody>
</table>

ORACLE
Recipient Territory 3

The override for recipient territory 3 is Product: Laptops.

The following table show the resulting coverage for recipient territory 3.

<table>
<thead>
<tr>
<th>Coverage Type</th>
<th>Definition</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dimensional Coverage</td>
<td>Geography</td>
<td>Europe</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Product</td>
<td>Laptops</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Industry</td>
<td>Any</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer A</td>
<td>Is in the high tech industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer B</td>
<td>Is in the services industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer C</td>
<td>Is in the utilities industry</td>
</tr>
<tr>
<td>Filtering Conditions</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Other Dimensions</td>
<td>Product</td>
<td>Laptops</td>
</tr>
</tbody>
</table>
The resources file is optional. It includes the territory name, resource name, resource function, and resource e-mail address. Use it to import additional territory team members, besides the owner.

- **Lines of Business (TERR_LOB.CSV)**
  The lines of business file is optional. It contains the territory name and the line of business for the territory.

- **Coverage (TERR_COVERAGE.CSV)**
  The coverage file is optional. It contains the territory name and all coverage definitions for each territory. The file lists all dimension members needed to define the territory. For every enabled dimension that is not included in the file, the dimension has the value Any. Included and excluded customers or partners are also listed.

Select Export or Import from the Actions list for the territories table in the Active Territories screen. The Territory Proposal screen has only export actions available. Two selections are displayed for both export and import: one for editing territories and one for moving territories to and from another environment.

### Changing Territories Using Import and Export

**Video**

Watch: This video tutorial shows you how to make changes to territory definitions by exporting the territories from the UI, making changes in .csv files, and from the UI importing the .csv files. The content of this video is also covered in text topics.

**Procedure**

You can export any branch of territories to a spreadsheet, perform edits, and import your changes into a territory proposal. To export a branch of territories, make changes, and import the territories:

1. Navigate to Territories.
2. Click **Details** to go to the Active Territories page.
3. Select the territory that is the top of the hierarchy where you want to make changes.
4. Using the right-click, select **Export Selected Territory Hierarchy**.
5. Click **OK**.
6. Click **OK**.
7. From the Actions menu, click **Export > View Export Status**.
8. Click **Refresh** until the export completes.
9. Download the compressed file from the **Exported data file** column.
10. Extract the four files from the compressed file to your computer. The following four files are extracted:
   - **Header (TERR_HEADER.CSV)**
     The Header file is always required for an import. The file includes the territory name, parent territory, and territory owner.
   - **Resources (TERR_RESOURCE.CSV)**
     The resources file is optional. It includes the territory name, resource name, resource function, and resource e-mail address. Use it to import additional territory team members, besides the owner.
   - **Lines of Business (TERR_LOB.CSV)**
     The lines of business file is optional. It contains the territory name and the line of business for the territory.
Coverage (TERR_COVERAGE.CSV)

The coverage file is optional. It contains the territory name and all coverage definitions for each territory. The file lists all dimension members needed to define the territory. For every enabled dimension that is not included in the file, the dimension has the value Any. Included and excluded customers or partners are also listed.

11. Make changes to the spreadsheets for any of the three optional files that you need for your changes and save them under the same file names.

12. Edit the spreadsheet for the Header file, which is required. For each territory, enter in the Action column either REPLACE or UPDATE.

13. Save the header file.

14. Compress all four files.

15. In the Actions menu of the Active Territories page, click Import to Proposal > Import Territories.

16. Select your new compressed file and click OK.

17. Click OK.

18. From the Actions menu, click Import to Proposal > View Import Status.

19. Check for any errors and click OK.

20. Go to Manage Proposals.

   Your import is contained in a new proposal with a name that starts with "Import of." Review the proposal and make any needed changes.


Moving Territories to Another Environment

Video

Watch: This video tutorial shows you how to migrate territory definitions from one environment to another. The content of this video is also covered in text topics.

Procedure

You can migrate territory definitions from one environment to another. Export the whole territory hierarchy or a selected hierarchy from the source, such as your test environment. Your import to a new environment creates a territory proposal that you can edit before activating.

Configure the new environment to be similar to the source environment. For example enable the same dimensions and create the resources assigned to territories. When you activate the import proposal, the imported definitions become active territories. Existing territories not in the Import proposal are deleted from active territories. New territories in the proposal are added. Modified territories are updated. To migrate territory definitions:

1. In the source environment, navigate to Territories.

2. Click Details to go to the Active Territories page.

3. Select the territory that is the top of the hierarchy that you want to export.

4. In the Actions menu, select Export, Export to Another Environment.

5. Click OK.

6. Click Refresh until the export completes.

7. Download the compressed file from the Exported data file column.

8. Click OK.

9. Sign out of the source environment.

10. Sign in to the destination environment.

11. Navigate to Territories
12. Click **Details** to go to the Active Territories page.
13. In the Actions menu of the Active Territories page, click **Import to Proposal > Import from Another Environment**.
14. Click **Choose File**.
15. Select your downloaded compressed file and click **Open**.
16. Click **OK**.
17. From the Actions menu, click **Import to Proposal > View Import Status**.
18. Check for any errors and click **OK**.
19. Go to Manage Proposals.

Your import is contained in a new proposal with a name that starts with "Import of." Review the proposal and make any needed changes.

20. Activate your proposal.

**Territory Import Reference**

**Territory Header Import File Reference**

You can export and import territories using a spreadsheet, from the Actions menu in the territories table in the Active Territories screen. If you use the provided spreadsheet format, then you can add new territories by importing the spreadsheets. This topic describes the spreadsheet and corresponding table columns for the TERR_HEADER.csv file. This file is required for imports.

**TERR_HEADER.csv File**

The following table lists the columns included in the Territory Header file along with descriptions and whether or not the column is used during the import process:

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Import?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal_Use</td>
<td>Used only in the case of test to production export and import.</td>
<td>Yes</td>
</tr>
<tr>
<td>Display_Original_Row_Number</td>
<td>This column is populated only in the rejected data file in case of import errors. It corresponds to the original line number in the input file used by the import process.</td>
<td>No</td>
</tr>
<tr>
<td>Language_Code</td>
<td>The language code used for translatable values. In the export file, this is based on the language of the user who triggered the export. Objects, names, and keys that are translatable will be extracted from records in translation tables.</td>
<td>Yes</td>
</tr>
<tr>
<td>Proposal_Number</td>
<td>The proposal number to which a given territory should be added. If specified, and the proposal already exists and is not activated, then the territory will be added to the proposal. If specified, and the proposal does not exist yet, then it will be created (with the name and number as in this file). If left blank, then the territory will be added to a new, system generated proposal.</td>
<td>Yes</td>
</tr>
</tbody>
</table>
### Column Name
- Proposal_Name
- Display_Added_To_Proposal_Y_N
- Action
- Territory_Number
- Territory_Name
- Parent_Territory_Number
- Display_Parent_Territory_Name
- Territory_Type
- Territory_Function_Code
- Source_Territory_Number
- Display_Source_Territory_Name

### Description
- The proposal name to which a given territory should be added. It is used only when a proposal is created (there are no proposals with the number, as per previous entry, in the application). This name is ignored if the proposal (with the number) already exists, or if the proposal number was not specified.
- Indicates if the territory was added to the proposal at the time of export. The value is Y if, in the case of exporting from a proposal, the territory is added. In all other cases the value is N. This is for information purposes only. This field is not imported.
- Used only for the export-edit-import flow. The valid values are DELETE or REPLACE.
- Territory number as in the source environment. For new territories it can be specified or can be left blank. If blank, then the application will generate a number at the time of import.
- Territory name.
- The number of the parent territory. This is used to define territory hierarchy.
- The name of the parent territory. This is for information purposes only. This field is not imported.
- The name of the territory type, such as Prime or Overlay. Valid names are in the lookup type MOT_TERRITORY_TYPE.
- The purpose of a salesperson’s territory. The function is entered on the Territories page and can drive the territory assignment behavior.
- The number of the source (inherited) territory. Used to define territory inheritance.
- The name of the source (inherited) territory. Used to define territory inheritance. This is for information purposes only. This field is not imported.

### Import?
- Yes
- No

---

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<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Import?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner_Program_Name</td>
<td>Name of the partner program.</td>
<td>Yes</td>
</tr>
<tr>
<td>Territory_Partner_Number</td>
<td>Unique identifier (Registry ID) of the territory partner.</td>
<td>Yes</td>
</tr>
<tr>
<td>Display_Territory_Partner_Name</td>
<td>Name of the territory partner. This is for information purposes only. This field is not imported.</td>
<td>No</td>
</tr>
<tr>
<td>Coverage_Model</td>
<td>The name of the coverage model, such as Customer or Partner. Valid names are in the lookup type MOT_TERR_COVERAGE_MODEL.</td>
<td>Yes</td>
</tr>
<tr>
<td>Description</td>
<td>Territory description.</td>
<td>Yes</td>
</tr>
<tr>
<td>EnableForecasting</td>
<td>The name of the forecast participation, such as Prime only or Overlay only. Valid names are in the lookup type ORA_MOT_TERR_ENABLE_FORECASTING</td>
<td>Yes</td>
</tr>
<tr>
<td>FcastInvisibleToOwnerYN</td>
<td>Forecast invisible to owner (Y for yes, N for no).</td>
<td>Yes</td>
</tr>
<tr>
<td>Eligible_for_Quota_Y_N</td>
<td>Eligible for Quota (Y for yes, N for no).</td>
<td>Yes</td>
</tr>
<tr>
<td>Revision_Reason</td>
<td>The name of the reason for the quota revision, such as New Territory, Owner Changed. Valid names are in the lookup type MOT_QUOTA_REASON.</td>
<td>Yes</td>
</tr>
<tr>
<td>Revision_Description</td>
<td>Quota revision description.</td>
<td>Yes</td>
</tr>
<tr>
<td>Revised_Quota_Y_N</td>
<td>Indicates territory quota must be revised, due to a change in the territory (Y for yes, N for no).</td>
<td>Yes</td>
</tr>
<tr>
<td>Owner_Email</td>
<td>Owner e-mail address. This is also the owner’s identifier.</td>
<td>Yes</td>
</tr>
<tr>
<td>Display_Owner_Name</td>
<td>Owner name.</td>
<td>No</td>
</tr>
<tr>
<td>Owner_Function</td>
<td>The name of the role (function) that the owner plays on the territory team, such as Salesperson or Legal. Valid names are in the lookup type MOT_TEAM_MEMBER_FUNCTION.</td>
<td>Yes</td>
</tr>
<tr>
<td>Owner_Administrator_Y_N</td>
<td>Is the owner a territory administrator? (Y for yes, N for no.)</td>
<td>Yes</td>
</tr>
</tbody>
</table>
## Territory Resource Import File Reference

You can export and import territories using a spreadsheet, from the Actions menu in the territories table in the Active Territories screen. If you use the provided spreadsheet format, then you can add new territories by importing the spreadsheets. This topic describes the spreadsheet and corresponding table columns for the TERR_RESOURCE.csv file. This file is optional for imports.

### TERR_RESOURCE.CSV file

The following table lists the columns included in the Territory Resource file along with descriptions and whether or not the column is used during the import process:

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Import?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display_Original_Row_Number</td>
<td>This column is populated only in the rejected data file in case of import errors. It corresponds to the original line number in the input file used by the import process.</td>
<td>No</td>
</tr>
<tr>
<td>Language_Code</td>
<td>The language code used for translatable values. In the export file, this is based on the language of the user who triggered the export. Objects, names, and keys that are translatable will be extracted from records in translation tables.</td>
<td>Yes</td>
</tr>
<tr>
<td>Territory_Number</td>
<td>Territory number as in the source environment. For new territories it can be specified or can be left blank. If blank, then the application generates the number at the time of import. If you opt in for the User-Defined Territory Number in Import feature, then you can provide your own unique territory numbers.</td>
<td>Yes</td>
</tr>
<tr>
<td>Display_Territory_Name</td>
<td>Territory name. Used only for a reference.</td>
<td>No</td>
</tr>
<tr>
<td>Resource_Email</td>
<td>Resource e-mail address. It is also the resource’s identifier.</td>
<td>Yes</td>
</tr>
<tr>
<td>Display_Resource_Name</td>
<td>Resource name. Used as a reference only.</td>
<td>No</td>
</tr>
</tbody>
</table>
### Territory Line of Business Import File Reference

You can export and import territories using a spreadsheet, from the Actions menu in the territories table in the Active Territories screen. If you use the provided spreadsheet format, then you can add new territories by importing the spreadsheets. This topic describes the spreadsheet and corresponding table columns for the TERR_LOB.csv file. This file is optional for imports.

**TERR_LOB.csv File**

The following table lists the columns included in the Territory Line of Business file along with descriptions and whether or not the column is used during the import process:

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Import?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display_ Original_ Row_Number</td>
<td>This column is populated only in the rejected data file in case of import errors. It corresponds to the original line number in the input file used by the import process.</td>
<td>No</td>
</tr>
<tr>
<td>Language_Code</td>
<td>The language code used for translatable values. In the export file, this is based on the language of the user who triggered the export. Objects, names, and keys that are translatable will be extracted from records in translation tables.</td>
<td>Yes</td>
</tr>
<tr>
<td>Territory_ Number</td>
<td>Territory number as in the source environment. For new territories it can be specified or can be left blank. If blank, then the application generates a number at the time of import. If you opt in for the User-Defined Territory Number in Import feature, then you can provide your own unique territory numbers.</td>
<td>Yes</td>
</tr>
</tbody>
</table>
### Territory Coverage Import File Reference

You can export and import territories using a spreadsheet, from the Actions menu in the territories table in the Active Territories screen. If you use the provided spreadsheet format, then you can add new territories by importing the spreadsheets. This topic describes the spreadsheet and corresponding table columns for the TERR_COVERAGE.csv file. This file is optional for imports.

**TERR_COVERAGE.csv File**

The following table lists the columns included in the Territory Coverage file along with descriptions and whether or not the column is used during the import process:

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Import?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display_ Original_ Row_Number</td>
<td>This column is populated only in the rejected data file in case of import errors. It corresponds to the original line number in the input file used by the import process.</td>
<td>No</td>
</tr>
<tr>
<td>Language_Code</td>
<td>The language code used for translatable values. In the export file, this is based on the language of the user who triggered the export. Objects, names, and keys that are translatable will be extracted from records in translation tables.</td>
<td>Yes</td>
</tr>
<tr>
<td>Territory_ Number</td>
<td>Territory number as in the source environment. For new territories it can be specified or can be left blank. If blank, then the application will generate a number at the time of import. If you opt in for the User-Defined Territory Number in Import feature, then you can provide your own unique territory numbers.</td>
<td>Yes</td>
</tr>
<tr>
<td>Display_ Territory_ Name</td>
<td>Territory name. Used only for a reference.</td>
<td>No</td>
</tr>
<tr>
<td>Coverage_Type</td>
<td>The coverage type such as: Dimensional, Inheritance, or Override. Valid names are in the lookup type MOT_ TERR_COVERAGE_TYPE.</td>
<td>Yes</td>
</tr>
<tr>
<td>Dimension_Name</td>
<td>Valid values are:</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>• Customer</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Customer Auxiliary 1</td>
<td></td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Import?</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td>---------</td>
</tr>
<tr>
<td>Dimension_Member_Key</td>
<td>Dimension member reference. See Dimension Member Rules table. At the time of import, if the key is supplied then it is used for matching, and Dimension_Member_Name is ignored. If the key is not supplied, then the Dimension_Member_Name will be used for matching.</td>
<td>Yes</td>
</tr>
<tr>
<td>Dimension_Member_Name</td>
<td>Name of the dimension member. See Dimension Member Rules table. You can enter a range of dimension members using a hyphen, or a series of members separated by commas. The export places each dimension member in a separate row. If your member name includes a hyphen, then surround the full name with quotation marks.</td>
<td>Yes</td>
</tr>
<tr>
<td>Include_Customer_Hierarchy_Y_N</td>
<td>Indicator whether the customer hierarchy should be included in the coverage or not. Applicable for Customer Inclusions and Customer Exclusions coverage types only. (Y for yes, N for no.)</td>
<td>Yes</td>
</tr>
<tr>
<td>Display_Additional_Information</td>
<td>The Registry ID (party number) if the dimension is either Customer or Partner.</td>
<td>No</td>
</tr>
</tbody>
</table>

**Dimension Member Rules**

Use the rules in the following table when entering dimension member keys or names. Dimension_Member_Name only must be specified for Product.

<table>
<thead>
<tr>
<th>Dimension Name</th>
<th>Comment</th>
<th>Dimension_Member_Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Type</td>
<td>Specify Named or Not Named.</td>
<td>Named / Not Named</td>
</tr>
<tr>
<td>Account Auxiliary 1..3</td>
<td>Enter a value as seen in territory Ults.</td>
<td>Value as seen in Ults.</td>
</tr>
<tr>
<td>Customer</td>
<td>Enter OS plus OSR Number (if known) or Registry ID (as seen in TM Ults). OS stands</td>
<td>OS plus OSR Number or Registry ID (as seen in Ults).</td>
</tr>
<tr>
<td>Dimension Name</td>
<td>Comment</td>
<td>Dimension_Member_Key</td>
</tr>
<tr>
<td>------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Customer Size</td>
<td>Enter a value as seen in territory UIs.</td>
<td>Value as seen in UIs.</td>
</tr>
<tr>
<td>Geography</td>
<td>If you know that a specific geography name is unique, then enter a value as seen in territory UIs, for example, Boston. If unsure, or if you know that the name is not unique, enter the full path such as United States<del>New York</del>New York. The full path is made up of geography members as seen in UIs concatenated with ~ character.</td>
<td>Alias and member name for members based on master geographies. For example: for 97229 postal code the entry is: United States<del>Oregon</del>Washington<del>Portland</del>97229. Territory geography path and zone name for zones. For example: for Pacific zone the entry is: Global<del>North America</del>United States<del>West</del>Pacific. To indicate that the first geography in the key is the top master geography, place the greater than symbol (&gt;) before the key: &gt;Canada. To indicate that the first geography in the key is the top node in the territory geography hierarchy, place the tilde symbol (<del>) before the key: <del>United States</del>New York</del>Canada indicates that United States is the top of the territory geography hierarchy.</td>
</tr>
<tr>
<td>Industry</td>
<td>Enter a value as seen in territory UIs.</td>
<td>Value as seen in UIs.</td>
</tr>
<tr>
<td>Organization Type</td>
<td>Enter a value as seen in territory UIs.</td>
<td>Value as seen in UIs.</td>
</tr>
<tr>
<td>Partner</td>
<td>Enter OS plus OSR Number (if known) or Registry ID (as seen in territory UIs). OS stands for Original System. OSR stands for Original System Reference. OS plus OSR exists only if partner data was imported from an external system.</td>
<td>OS plus OSR Number or Registry ID (as seen in UIs)</td>
</tr>
<tr>
<td>Product</td>
<td>Enter the product name (in the Dimension_Member_Name column) as seen in territory UIs. Leave Dimension_Member_Key column empty. If this does not result in unique identification of the product dimension member, then the following will need to be done: For product group: Enter Product Group Internal Name (exposed in the Order Capture application) into the Dimension_Member_Key column. For product item: Enter Item Number (exposed in the Product Model application) into the Dimension_Member_Key column. When Dimension_Member_Key column is specified, the value in Dimension_Member_Name column is ignored.</td>
<td>Product Group - Internal Name or Product Item - Item Number.</td>
</tr>
<tr>
<td>Sales Channel</td>
<td>Enter a value as seen in territory UIs.</td>
<td>Value as seen in UIs.</td>
</tr>
<tr>
<td>Dimension Name</td>
<td>Comment</td>
<td>Dimension_Member_Key</td>
</tr>
<tr>
<td>----------------</td>
<td>---------</td>
<td>----------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Chapter 8

Setting Up Assignment

Assignment Processing in Sales: Overview

Assignment processes assign resources (for example, salespeople or territory owners) to the business objects they work on, such as an opportunity or a lead. After they’re assigned to business objects, resources and territory owners -- and their managers -- have visibility into the business object. Territory-based assignment is the default assignment mechanism in the sales applications. The applications also support rule-based assignment to assign additional resources to business objects.

Candidate and Work Objects

When setting up assignment, you should be familiar with two types of assignment objects: candidate objects and work objects:

- Work objects are the business objects that get assigned, for example, accounts, opportunities, leads, partners, and deals.
- Candidate objects are the possible pool of assignment candidates, for example resources or territories.

Territory-Based Assignment

After you set up your territories, territory-based assignment matches territory dimensions and attributes to work objects. You can set up territory-based assignment to be completely automated, to happen on-demand, or you can use a combination of these settings. Territory-based assignment requires that you set up your territories and resource hierarchy, set profile options to configure assignment, and run assignment processes.

For an introduction to setting up territory-based assignment, read the topics on setting up territories and assignment in the Getting Started with Your Sales Implementation guide.

Rule-Based Assignment

Rule-based assignment lets you set up additional rules used to assign resources to work objects. Rule-based assignment lets you capture attributes not defined in territory-based assignment. After you set up the rules containing conditions that records must meet, when resources match the rule conditions, they get assigned to the object.

For example, you can use rules to:

- Assign a certain salesperson to the sales team when the customer is located in specific state or region.
- Assign the accelerated leads expert to leads whose time frame is less than three months.
- Calculate lead rank based on lead score.

Rule-based assignment requires that you plan your rules, create the rules using the rules UI, and set profile options to configure assignment, in addition to any scheduled processes that must be run.

Assignment Profile Options

Each of the business objects available in assignment has its own set of profile options that allow you to further configure assignment.
Scheduled Processes
Scheduled processes are batch jobs that capture data and allow business objects to act on that data. You must schedule several processes when using assignment.

Assignment Reports
You can use the Diagnostic Dashboard to generate reports about assigned objects and the volume of territory data involved in assignment.

Assignment Resources
To learn more about assignment, refer to the following resources:

- Related topics: If you’re reading this topic in the Implementing Sales guide, refer to the related topics in the Setting Up Assignment for Sales chapter.
- Getting Started with Your Sales Implementation guide for more discussion of assignment in sales.
- Online help: Use the keyword assignment to search for relevant topics.
- Assignment Resource Center: For additional assignment articles, see the Assignment Manager Resource Center (1522958.1) on My Oracle Support at https://support.oracle.com.

Implementation Concepts for Assignment

Configuring Assignment: Critical Choices
Assignment is the process of selecting a candidate object and executing the association with a work object. Assignment consists of three phases:

- Setup phase: Setting up assignment processing through assignment configuration
- Matching phase: Matching rules or mappings are evaluated to find the right assignees from a list of possible candidates
- Assignment phase: The assignment of matching candidates is handled

An assignment configuration is predefined for each sales application providing assignment processing. This assignment configuration is available from one of the following setup tasks:

- Manage Customer Center Assignment Objects
- Manage Sales Assignment Manager Objects
- Manage Sales Lead Assignment Objects

You can use these setup tasks to add or remove assignment attributes, define the relationship between each work object and candidate object, and define mapping sets and mappings that drive territory-based assignment and rule categories that drive rule-based assignment.

Note: Use the Manage Sales Assignment Manager Objects task for opportunity assignment.
The predefined assignment configuration also includes the mapping sets and mappings that drive territory-based assignment.

To best plan the configuration, consider the following points that are discussed in this topic:

- Assignment objects
- Attributes
- Mappings sets and mappings
- Rules

**Assignment Objects**

An assignment object is a data entity or a collection of data treated as a unit, such as a sales account, an opportunity, or a lead. During assignment configuration, carefully consider which of your business objects require assignment, and create work objects only for those.

A set of assignment objects is predefined for the assignment of territories or resources to accounts, partners, opportunities, leads, and deals.

**Attributes**

You use attributes to further define assignment processing. For example, you might want to assign a sales representative (resource) to an opportunity (assignment object), based on the risk level of the opportunity. In this case, you select the attribute of the opportunity work object that corresponds to risk level, and the attribute of the resource candidate object that corresponds to name or email address. Selecting these attributes makes them available for mappings and for conditions on your rules. Therefore, ensure that you select the attributes that reflect the criteria that you want to use for matching candidate objects to work objects.

Several attributes are predefined as assignment attributes for each assignment object.

**Related Candidates**

Candidate objects are related to work objects, and, for each relationship, the appropriate assignment mode (such as matching and scoring) and processing options are predefined. You must not modify these predefined settings except for the No Matches Handling option for the Sales Lead work object. The No Match Handling option controls the assignment behavior when no matching candidate is found. By default, this is set to Remove current assignment. You can change this to Retain current assignment, which retains the current candidate assignment when no matching candidate is found. You can also change it to Error, which generates an error if no matching candidate is found.

**Mappings Sets and Mappings**

Assignment mapping sets and their related mappings drive territory-based assignment. The mapping sets determine which mappings are used, and the sequence mapping sets are used in territory-based assignment. The mappings identify the dimensions, attributes, and territory filtering used in the assignment processing.

Default mapping sets and their related mappings are predefined.

**Rule Categories, Rule Sets, and Rules**

The application provides default rule categories. These rule categories identify the type of rule processing being performed, such as matching, scoring, classification, or territory. Rule sets group the assignment rules and determine the additional processing performed, such as using scores for each candidate and filtering the candidates assigned to top or random matches. Rules are defined to execute rule-based assignment. Rules are designed to return candidates if they match a set of criteria, are within a defined scoring range, or are of a specific classification.
Create rules using work objects, candidate objects, and attributes that you already established. When designing your rules, carefully consider how you want to match candidates to work objects. For example:

- Do you want resources assigned based on their geographic location, their product knowledge, on the status or score of an object, or a combination of any of these attributes?
- Do you want to match candidates only, or do you want to match candidates and score them?
- In a multiple-candidate scenario, do you want to assign all matching candidates or only those who achieve higher than a specific score?

Exporting and Importing Assignment Objects and Rules Setup Data: Explained

This topic explains exporting and importing assignment objects and rules setup data, along with the points to consider while moving the setup data.

Almost all application implementations require moving functional setup data from one instance into another at various points in the lifecycle of the applications. For example, one of the typical cases in any enterprise application implementation is to first implement in a development or test application instance and then deploy to a production application instance after thorough testing. You can move functional setup configurations for assignment objects or assignment rules from one application instance into another by exporting and importing configuration packages from the Manage Configuration Packages page.

To export and import assignment setup data, you should start by defining an implementation project for the required assignment setup task:

- Manage Customer Center Assignment Objects
- Manage Sales Assignment Manager Objects
- Manage Sales Assignment Manager Rules
- Manage Sales Lead Assignment Objects
- Manage Sales Lead Assignment Rules
- Manage Service Assignment Objects
- Manage Service Assignment Rules

The Manage Configuration Packages setup task exports the assignment objects or rules setup data.

A configuration package contains the setup import and export definition. The setup import and export definition is the list of setup tasks and their associated business objects that identifies the setup data for export as well as the data itself. You generate the setup export and import definition by selecting an implementation project and creating a configuration package. The tasks and their associated business objects in the selected implementation project define the setup export and import definition for the configuration package. In addition, the sequence of the tasks in the implementation project determines the export and import sequence.

You can export a configuration package once you create it, or at any time in the future. During export, appropriate setup data will be identified based on the setup export definition and added to the configuration package. The setup data in the configuration package is a snapshot of the data in the source application instance at the time of export. Therefore you must publish the assignment objects and rules before export. After the export completes, you can download the configuration package as a zipped archive of multiple XML files, move it to the target application instance, and upload and import it. You must review and publish the assignment objects and rules setup data in the target application instance to make them available for assignment processing.

See the chapter about importing and exporting setup data in the Using Functional Setup Manager guide for more details.
Exporting and Importing Setup Data: Points to Consider

Based on your implementation, you might have to follow different approaches while exporting and importing assignment setup data.

Consider the following points:

- If your implementation is using territory-based assignment only, then the implementation project needs to include only the Assignment Objects setup tasks.
- If your implementation is using territory-based assignment with rule filtering or rule-based assignment, the implementation project should include both the Assignment Objects and Assignment Rules setup tasks.
- If you are not sure whether your implementation is using territory or rule-based assignment, then Oracle recommends that you include both Assignment Objects and Assignment Rules setup tasks in the implementation project.
- The sequence of the tasks and business objects should remain as set by default.

The application allows you to delete assignment objects, assignment attributes, rule categories, rule sets, rules and conditions in an environment, for example test. If that setup data subsequently is exported and then imported into another environment, for example production, the data in the target database is not removed.

If your implementation plans to import and export setup data for assignment objects and assignment rules, you must ensure not to delete assignment objects, rule categories, rule sets, and rules. You must set them to inactive in case you want to delete them. Additionally, you must not delete assignment rule conditions. Instead, you must set the rule to inactive and then recreate the rule excluding the condition that is no longer needed.

Related Topics
- Configuration Packages: Explained

What's the difference between rule-based and territory-based assignment?

Territory-based assignment is the primary means of assignment for your sales application objects, such as accounts, leads, and opportunities. For territory-based assignment, while creating the assignment object, you create work object to candidate object mapping sets that are used to make candidate assignments.

You can use rule-based assignment to identify supplemental resources or filter the matching territories. You can also use rules to score work objects and for classification. For rule-based assignment, you use the rules editor to create expression-based rules that the assignment feature uses to make candidate assignments.

In a territory-based assignment scenario, you typically create a mapping set between a work object and a candidate object to make the appropriate candidate assignment. This mapping set can consist of one or more mappings between the work object attributes and the territory candidate object attributes.

In a rule-based assignment scenario, you create rules with conditions that must be met to make the appropriate resource assignments. For example, a rule is created with the condition that when the opportunity risk level is high, a resource located in the state of California is assigned.

Assignment Mappings
Mapping Set Components: How They Work Together

Assignment mapping sets and their underlying mappings drive territory-based assignment. This topic explains how these components work together in assignment processing.

The following figure identifies the sales application work objects that have associated default mapping sets and mappings. Mapping sets and mappings drive territory-based assignment, and the work object attributes map to the territory candidate object dimensions and attributes.

Mappings

The mappings identify the dimensions, attributes, and territory filtering used in the assignment processing. Default mapping sets and their related mappings are predefined for account, lead, partner account, deal, and opportunity revenue assignment. This predefined mapping assumes that opportunities, leads, sales, partners, accounts, and deals use the same territory hierarchy.

Each predefined mapping set has between 9 and 16 mappings that determine the information about the object, such as the account industry or the sales lead product, and how each is mapped to a dimension or attribute on the territory.

You can create additional mappings using the work objects, candidate objects, and attributes that you already established.

Mapping Sets

Mapping sets enable the grouping of mappings so that you can create more than one mapping for each combination of work object and candidate object. The mapping set concept is used only with territory-based assignment and territory-based assignment with rule filtering. Mappings sets are predefined for accounts, leads, opportunities, partner accounts, and deals. When managing assignment objects, the user can define additional mapping sets, each of which contains multiple mappings, for each combination or work object and candidate object.
Mapping Types

There are three types of assignment mapping:

**Dimension Mapping**: Dimension mappings must be used when the work object and candidate object attributes in the comparison are dimension attributes, such as Product. When creating the mapping, use the Function Code field to specify a unique identifier for the dimension. Generally attribute mappings are used when the work object and candidate object attributes in the comparison are non-dimensional attributes. But there are attribute mappings predefined to match the geography and account information about the account with the geography dimension, and account inclusions or exclusions respectively.

When creating the mapping, the Function Service and Function Code are only needed if a translations function is used. The function code field is used to specify a unique identifier for the attribute, and this identifier is passed to the translation function.

An example is assigning territories to opportunity revenue lines based on the product associated with the revenue line. In this case, dimension is selected as the mapping type. The candidate object low attribute and high attribute correspond to the names of the low sequence and high sequence attributes for product on the territory. The work object low attribute and high attribute correspond to the names of the low sequence and high sequence attributes for product on the revenue line.

**Attribute Mapping**: This mapping enables you to compare and match attribute values between a work object attribute and a candidate object attribute. When the value of the candidate object attribute matches the work object attribute, the candidate is selected. Attribute mappings are typically used when the work object and candidate object attributes in the comparison are non-dimensional attributes. This type of mapping is also used to capture the mapping between hierarchical dimensions account and geography.

For example, consider a lead work object with a Partner Identifier attribute and the territory object with Partner ID attribute. The selection criterion is: `select Sales Lead Territories where Sales Lead Territory.Partner Identifier equals Sales Lead.Lead Partner Identifier`. The assignment engine will use this mapping data to construct a query on the candidate object that is equivalent to the selection criteria.

**Literal Mapping**: Literal Mapping is used almost exclusively to filter the candidate objects. This form of mapping enables the comparison of candidate attributes against a specific value chosen by the user. The assignment engine will compare the mapped candidate object attribute against the specified literal value. For example, select the Territory Candidate object that has the attribute Coverage Model that equals the value PARTNER_CENTRIC.

**Note**: For Literal Mappings, ensure that the value entered corresponds to the Lookup Type Value code, not the meaning.

Assignment Processing Using Mapping Sets and Mappings

When designing your mappings, carefully consider the dimensions and attributes you use in your territory structure and how you want to match these territory candidates to work objects. Also consider the shape of the information used in the territory structure; this may affect the sequence of each mapping. A sequence can be entered for each mapping set which is used to determine the order in which these mapping sets will be used in the territory-based assignment processing. The sequence of the dimension mappings used in territory matching can affect performance. The most selective mapping should be given the lowest sequence number. By default, this dimension is the Geography Dimension. By using the lowest sequence number, it is performed earliest in the matching process, which results in the smallest number of territory matches. Mappings that do not have a sequence are used together at the end of the matching process.

Sometimes the mapping set sequence does not matter. For example, there are two predefined opportunity revenue assignment mappings. When the first mapping set is used, it finds matching territories based on the information about the opportunity/opportunity account, and the territory information. Then the second mapping set is used which matches territories based on the opportunity/opportunity partner information and the territory information. The order of the mapping sets are interchangeable; regardless of which mapping set is used first, the resulting territories that match will be the same.
In the case of leads, the mapping set sequence is important as the territories matched using the first mapping set may result in a primary partner being added to the lead. This information is significant to the territory matching performed using the second mapping set.

Mapping sets can be made conditional to control whether the mapping set is used or not used during assignment processing. For example, the partner channel manager territory assignment mapping set conditional attribute is set to the value RevenuePartnerId. During the assignment processing of a revenue line, if the Revenue PartnerId attribute for that revenue line contains a value, then this mapping set will be used in territory matching processing.

An indicator in the Related Candidates region controls whether to merge the matching assignment candidates identified from processing each set of mappings. This indicator is used to drive the merging of matching candidates when multiple mapping sets are used in assignment processing. If the box is checked, then the candidates are merged. The default is not to merge the candidates.

In most implementations, the predefined mapping sets are sufficient. But mapping sets can offer some flexibility if user-defined assignment processing is needed.

Creating Assignment Mappings: Examples

For territory-based assignment, you must create work object to candidate object mappings while creating the assignment object. These mappings are used to make candidate assignments. The scenarios in this topic illustrate creating the different mapping types:

- Attribute mapping
- Dimension mapping
- Literal mapping

Creating an Attribute Mapping

You want to assign territories to an opportunity revenue line when the territory line of business is the same as the opportunity line of business. To create an attribute mapping:

1. Create the following mapping:
   - Work object - Revenue
   - Candidate object - Territory
2. Select the territory when the attribute territory line of business code is equal to the revenue line of business.
3. Enter a value for the sequence which determines the order in which the mapping is used when matching territories.

   **Note:** Assign the lowest sequence number to the most selective mapping, and the next sequence number to the next most selective mapping.

Creating a Dimension Mapping

You want to assign territories to opportunity revenue lines based on the product associated with the revenue line. To create a dimension mapping:

1. Select the mapping type **Dimension** and enter a sequence value, which determines the order in which the mapping is used when matching territories. The most selective dimension mapping should be given the lowest sequence number.
2. Enter the function `getDimMemberSequence` and the Service
   `oracle.apps.sales.territoryMgmt.territories.publicModel.util.ConsumableComponentsUtil`.
3. Enter the value `Prod` for the function code.
4. Select the candidate object `Territory`, the work object `Revenue`, and the alternate work object `Revenue`.
5. Select the candidate object low and high attributes.
   The candidate object low and high attributes correspond to the names of the low sequence and high sequence attributes for product on the territory. For example, `Dimension Sequence Low` and `Dimension Sequence High` respectively.
6. Select the work object low and high attributes.
   The work object low and high attributes correspond to the names of the attributes for product on the revenue line. For example, `Inventory Item ID` and `Inventory Organization ID` respectively.

When assigning territories to opportunity revenue lines based on the product, a revenue line may be for a product group instead of a product. In this case, the work object alternate low and high attributes can be used. For example, alternate work object low attribute would be set to `Product Group`.

If the revenue line does not contain either a product or product group, the low and high default values for the product dimension mapping can be used to match against the product dimension with the value `Any`. In this example, the default value low would be set to 1 and default value high to `99999999999999`.

**Creating a Literal Mapping**

Literal mappings are a way of filtering the matched territories based on specific values of a territory attribute. You want to find only territories that have an account-centric coverage model assigned to each revenue line. For example, territory coverage model equals `SALES_ACCOUNT_CENTRIC`.

> **Note:** Literal mappings use the code value for lookup-based fields, and not the meaning value.

To create this literal mapping:

1. Select the mapping type `Literal` and optionally enter a sequence value, which determines the order in which the mapping is used when matching territories.
2. Select the candidate object `Territory`.
3. Select the candidate object attribute that will be used for filtering. For example, Coverage Model.
4. Select the operator value `Equals`.
5. Select the literal value. In this example, only sales account centric territories should be assigned to revenue lines, so the Literal Value entered corresponds to the code value for the coverage model. For example, `SALES_ACCOUNT_CENTRIC`.

**Assignment Rules**

**Assignment Rule Components: How They Work Together**

The rule category, rule sets, and rules are components that work together to determine how the assignment engine processes rule-based assignments for work objects.

Rule categories are predefined for each object leveraging assignment rules. Each predefined rule category determines the type of rule processing performed, for example, matching, scoring, and classification.
Depending on the rule category selected, rule sets may allow filters to be used to determine whether all matches are assigned, or a random number of matches. Additionally, a score may be used to allow further filtering of the matching candidates, such as the top X candidates or all above or equal to a minimum score.

At the rule level within a rule set, the action determines the behavior when a rule is evaluated as true. The rule action option works in conjunction with the rule category selected.

The following table describes how the rule set components work together.

<table>
<thead>
<tr>
<th>Mode</th>
<th>Use Score</th>
<th>Filters</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Matching or Territory</td>
<td>X</td>
<td>All</td>
<td>Increase Score By x for each matching or selected candidate</td>
</tr>
<tr>
<td>Applicable only if you use territory-based assignment with rule filtering.</td>
<td></td>
<td>All Above Minimum Score (set Minimum Score value)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Random (set Number of Candidates value)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Top X (set Number of Candidates value)</td>
<td></td>
</tr>
<tr>
<td>Matching or Territory</td>
<td>Not applicable</td>
<td>All</td>
<td>Assigns the matching or selected candidates.</td>
</tr>
<tr>
<td>Applicable only if you use territory-based assignment with rule filtering.</td>
<td></td>
<td>Random (set Number of Candidates value)</td>
<td></td>
</tr>
<tr>
<td>Scoring</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>Increase Score By x</td>
</tr>
<tr>
<td>Classification</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>Set Value To x</td>
</tr>
</tbody>
</table>

**Rule Category and Rule Set**

The rule category selected for the rule set determines the type of rule-based assignment processing to be performed. For example, if you select the rule category named Sales Lead Resource Rule Category, the candidates that match the conditions of the rules evaluated as true by the assignment manager are assigned to the work object. The number of matching candidates that are assigned to the work object is determined by the rule set filter settings. Only one rule category can be associated with each rule set.

A rule category is predefined for each type of rule-based assignment processing supported by each sales application object. For example, the rule category named **Sales Team Member Recommendation Default Rule Category** is predefined for resource rule-based assignment of Opportunities, and **Sales Lead Resource Rule Category** is predefined for resource rule-based assignment of Leads. Similar rule categories can be predefined for territory rule filtering for revenue lines, territory rule filtering for leads, lead scoring, lead raking, and lead qualification.

Rule categories are created and edited through the Manage Assignment Objects setup task for the relevant application. A rule set contains rules that belong to a specific rule category.

**Use Score**

The **Use Score** option determines whether a score is used when identifying matching candidates. The number of matching candidates that are assigned to the work object is also determined by the rule set filter settings.
**Filter Settings**

The filter settings are used in conjunction with some rule categories and the rule set **Use Score** option. The filters allow you to indicate how many matching candidates you want to assign to the work object. When set to **All Above Minimum Score**, all of the matching candidates above a particular score are assigned to the work object. Set the score in the **Minimum Score** field.

When set to **Top X**, a number of matching candidates with the highest scores are assigned to the work object. Use the **Number of Candidates** field to specify how many top matching candidates to assign.

When the filter is set to **Random**, a random selection of matching candidates is assigned to the work object. When the rule set **Use Score** option is selected, and the filter is set to **Random**, a random selection of matching candidates with the highest scores is assigned to the work object. Use the **Number of Candidates** field to specify how many random matching candidates to assign.

**Rules**

One or more rules may be defined for each rule set. Each rule is the distinct set of criteria that is evaluated and candidates or scores that are eligible to assign if the conditions are met. The rule action may apply if all conditions are met, or any conditions are met.

The assignment rule administration allows more than one user at a time to create or update rules that belong to the same or different rule sets or categories. For example, if User A is currently updating assignment rules for the **Sales Lead Resource Rule Category** rule category, then User B can update assignment rules for that same rule category or another rule category at the same time.

**Action**

The action set at the rule level determines the action that is performed when a rule is evaluated as true.

If defining rules to assign resources to an object, you can search for and select the specific resources to be assigned when the rule conditions are evaluated as true.

When a matching rule category is selected, for example, Sales Lead Resource Rule Category, the rule action assigns the matching candidates. If a rule with that action is evaluated as true, the candidates that match the conditions for that rule are assigned. The filter setting at the rule set level determines whether all matching candidates are assigned (All), or a random number of matching candidates are assigned (Random).

When a matching rule category and the **Use Score** option are selected, the rule action increases the candidate score by the specified value. If a rule with that action is evaluated as true, the candidates that match the conditions for that rule get the value in the **Action** added to their score. For example, you select Sales Team Member Recommendation Default rule category and the **Action** for one of the rules in that set is **Increase Score By 10**. If that rule is evaluated as true, the resources that match the conditions for that rule get 10 added to their scores. The scores are cumulative, so if any of the resources that matched the conditions in the rule in the example also match the conditions for other true rules in the set, those resources get additional values added to their current score of 10. The filter setting at the rule set level determines whether all matching candidates are assigned (All), or all matching candidates above a specified score are assigned (All Above Minimum Score), or a random selection of matching candidates with the highest scores are assigned (Random), or a number of matching candidates with the highest scores are assigned (Top X).

When a classification rule category is selected, the rule action is **Set Value To Value Name**. For example, the rule category is **Sales Lead Rule Qualification Rule Category**, the action for one of the rules in that set is **Set Value to Qualified**. If that rule is evaluated as true, the **Status** for the lead being classified is set to **Qualified**.

When the rule category **Sales Lead Scoring Rule Category** is selected, the rule action is **Increase Score By Score Value**. If a rule with that action is evaluated as true, the value in the action is added to the score of the work object associated
with the rule set. For example, if the action for one of the rules in that set is Increase Score By 20, and that rule is evaluated as true, the score for the Lead is increased by 20.

Note: When you are creating or updating assignment rules, you must click Save and Publish to ensure that your changes are live and included in the assignment processing.

Creating Assignment Rules: Examples
Assignment rules are created using rule sets, rules, conditions, and actions. The assignment process uses your rules to evaluate and recommend candidate assignments for specified work objects. This topic provides scenarios to illustrate the different types of rules you can create.

Creating Lead Qualification Rules
In this scenario, you want to create rules to classify leads as qualified if the following attributes are set as specified:

- Lead Customer is sales account.
- Lead Product is set to Is Not Blank.
- Lead Score is greater than 150.

To create a rule to classify leads as qualified:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Leads
   - Task: Manage Sales Lead Assignment Rules
2. Search for and navigate to the assignment configuration setup task for the relevant object:
   - For sales lead and deal assignment, go to the Manage Sales Lead Assignment Rules task. This is the task used as an example in this topic.
   - For the Opportunity functional area assignment, select the Manage Opportunity Assignment Manager Rules task.
3. In the setup task page, select the category for the appropriate assignment flow, in this case Sales Lead Qualification Rule Category.
4. Click the Add Row icon to create a rule set for the predefined rule category Sales Lead Qualification Rule Category.
5. Create a rule with the three conditions that match the attribute settings for a lead to be considered a qualified lead:
   - Lead Product: Select the lead attribute Primary Product ID. Select the Is Not Blank operator.
   - Lead Customer: Select the lead attribute Sales Account Indicator, and then select the Equals operator. Enter the value of Y.
   - Lead Score: Select the lead attribute Score, and then select the Greater Than operator. Enter the value of 150.
6. In the Actions region, select Qualified from the Return the Candidate Value As Qualified list.

Creating Lead Scoring Rules
In this scenario, you want to create a scoring rule to:

- Increase lead scores by 150 if the lead attribute Lead Time Frame is set to 3 months.
• Increase lead scores by 100 if the following attributes for leads are set as specified:
  o Budget Status is Approved
  o Budget Amount is greater than 500000

To create this scoring rule:

1. Create a rule set for the predefined rule category Sales Lead Scoring Rule Category.
2. Create the first rule with the conditions that match the attribute settings you want a lead to have in order to add 150 to its score:
   o Choose the object Sales Lead and attribute Time Frame, and then select the Equals operator. Select 3 months.
   o Enter the action as Increase the Score by 150.
3. Similarly, create your remaining rule for the budget attributes and action to Increase the Score by 100.
   a. Add the first condition: Choose the object Sales Lead and attribute Budget Status, and then select the Equals operator. Select Approved.
   b. Add the second condition: Choose the object Sales Lead and attribute Budget Amount, and then select the Greater Than operator. Enter 500000.
   c. Enter the action as Increase the Score by 100.

Creating Matching Candidate with Scoring Rules

Assign different country specialists to opportunities in some European countries based on the country and the risk level of the Opportunity. To create matching candidate with scoring rules:

1. Create a rule set for the predefined category Sales Lead Resource Rule Category and select the Use Score option, the filter type of All Above Minimum Score, and the minimum score set to 20.
2. Create three rules each with conditions:
   a. Create the first rule with the following condition and actions:
      • Select the object Opportunity, and then choose the attribute Customer Country. Select the Equals operator, and then select DE.
      • In the rule action, set Increase Score By to 20.
      • Select and add the appropriate resource.
   b. Create the second rule with the following conditions:
      • Select the object as Opportunity, and then choose the attribute name Customer Country. Select the In operator, and then select FR and UK as condition values.
      • In the rule action, set Increase Score By to 20.
      • Select and add the appropriate resource.
   c. Create the third rule with the following conditions:
      • Select the object Opportunity, choose the attribute name Risk Level. Select the Equals operator, and then select the value High.
      • In the rule action, set Increase Score By to 20.
      • Select and add the appropriate resource.

Related Topics
• Accessing Tasks to Update Existing Setup Data: Procedure
What happens if I mark an assignment object or one of its attributes as inactive?

When you mark an assignment object as inactive, the selected work or candidate assignment object isn’t available for assignment processing. When you mark an assignment attribute as inactive, the selected work or candidate object attribute isn’t available for assignment processing.

Note: The object or attribute can’t be set to inactive if there is a mapping set, mapping, or rule defined using the object or attribute.

Using Territory-Based Assignment with Rule-Based Filtering: Example

This topic illustrates using territory-based assignment with rule-based filtering. In this example, you find one or more matching territories and use assignment rules to filter the list of territories assigned to sales leads.

Scenario

Your company wants to assign new leads to the correct territory. If there is no sales channel identified on an incoming lead, then the application should determine if the lead should go to a partner or remain internal. If the deal is internal, then only the prime territories are assigned. If the deal is pushed to a partner, then a channel manager is also assigned to oversee the deal.

Transaction Details

Leads are the primary marketing business objects that the assignment engine processes. Territory assignment is the primary means of assigning the appropriate salespeople to the lead. Rule filtering may also be used to filter the territories, for example when the sales channel is not identified. The rule filtering is performed when the Assignment Rule for Territory-Based Lead Assignment (MKL_LEAD_ASSIGNMENT_RULE) profile option is set to use rule filtering.

In this scenario, the work object is Lead and the candidate object is Territory. The assignment is territory-based. The assignment processing finds one or more matching territories. Assignment processing then uses the rule category defined in the Assignment Rule for Territory-Based Lead Assignment profile option to determine the set of rules to use for the rule filtering.

After the territory-based assignment delivers a list of territories, the rules can fine-tune the assignment process:

1. Rule for SALES CHANNEL Is not blank
   a. SalesLead.Sales Channel Is not blank
   b. Action: Return matching candidates
2. Rule for SALES CHANNEL Is blank, Assign Channel Manager
   a. Sales Lead.Sales Channel Is blank
   b. Sales Deal.Deal Size Greater than 1,000,000
   c. Territory.Territory Type In Partner, Sales Channel Manager
   d. Action: Return matching candidates
3. Rule for SALES CHANNEL Is blank, Assign Prime
   a. Sales Lead.Sales Channel Is blank
   b. Sales Deal.Deal Size Lesser than 1,000,000
c. Territory.Territory Type Equals Prime  
d. Action: Return matching candidates

Analysis
When the lead comes in, it must be assigned to a territory for follow-up. Based on the SALES CHANNEL rules, territory-based assignment can determine if the lead is a smaller deal that can be handled by your partners (and a Sales Channel Manager to oversee), or whether it is a larger deal that must be followed up by the internal sales force.

Resulting Assignments
The assignment engine first identifies the list of territories for the lead. The rules then determine who gets the deal:

1. This first rule determines if a Sales Channel value exists. If it does, then all territories identified (by way of territory-based assignment) are assigned.
2. The second rule says if there is no sales channel assigned, and the deal is under one million dollars, assign the lead to a partner and a Sales Channel Manager.
3. The final rule is used when there is no sales channel value, and the deal is greater than one million dollars, the lead is assigned to the prime (internal) territories.

User-Defined Assignment

User-Defined Assignment Flows: Explained
Assignment processes assign the right salespeople and their territories to core sales objects, such as opportunities and leads, using territory dimensions or assignment rules.

You can configure user-defined assignment flows to assign user-defined objects or to perform additional or alternate assignment processing on standard objects.

Note: In the context of assignment, "user-defined" objects are those objects you create using the configuration tool Oracle Application Composer.

User-Defined Assignment Key Features
User-defined assignment lets you:

- Assign the appropriate resource or group quickly and efficiently using assignment rules.
- Use a simple approach to define the criteria that matches rule values with resources or territories.
- Assign territories to user-defined objects with assignment rules, an approach that lets you balance your sales team efforts while taking into account the unique aspects of your business.
- Define rules that match fields on business objects with fields on territories and resource objects. Or, define rules where fields contain specific values. These fields and business objects can be both user-defined and standard.
- Define assignment rules to calculate a score for an object or set the value of a specific field if certain conditions are met.
- Automatically assign new records.
- Allow salespeople to run assignment from within the applications.
- Use the Perform Assignments batch assignment process to assign user-defined object records in bulk.
Be sure to publish assignment changes when using user-defined objects in assignment. See the topic on publishing assignment information for details.

User-Defined Assignment of Territories: Points to Consider

This topic explains the important points to consider while using user-defined assignment flows to assign territories to user-defined objects.

Points to Consider

The points to consider while using user-defined assignment flows to assign territories to user-defined objects include:

- You can assign territories to user-defined objects using rule-based assignment. Territory-based assignment is not supported.
- You cannot use territory coverage, such as geo or product in the assignment processing of territories to a user-defined object. Instead, you must use the standard fields on a territory, such as name, number, owner, along with any user-defined fields. Assignment processing uses the standard fields on a territory in addition to using the standard and user-defined fields on the user-defined object.
- Oracle recommends that you use the Territories feature to create and maintain territories so that the latest active territory details are available.

Publishing Assignment Changes

Publishing Assignment Information: Explained

Assignment processing uses only published assignment configurations and rules. Therefore, any time you change assignment configurations or rules, you must publish the changes. For example, if you add a new sales lead assignment rule but don’t publish the changes, then the next time assignment processing occurs, the assignment processing will skip the new rule.

You publish assignment information in the following ways:

- Publish from an application’s assignment setup pages in Setup and Maintenance. For example, publish in the Manage Sales Lead Assignment Rules page or the Manage Sales Assignment Manager Objects page.
- Run the scheduled process Publish Assignment Information and Refresh Candidate Cache.

Oracle recommends that you publish assignment information when you:

- Update the assignment configuration, which includes assignment objects, attributes, and mappings.
- Create or update assignment rules where the changes are infrequent or there is small number of assignment rules.
- Create user-defined objects or fields that you’re going to use in assignment.

Publishing Using the Assignment Setup Pages

You can publish assignment data from any of the assignment objects and assignment rules setup pages, such as Manage Customer Center Assignment Objects or Manage Sales Lead Assignment Rules.

After you create or update assignment data or rules, in the applicable setup page, click the Save and Publish button to publish assignment information and make it available for use in assignment processing. Clicking the save and publish button
submits the process that publishes assignment configuration and rules information. To monitor the status of the publish process, click the refresh icon next to the Last Published text in the page.

If you make updates to assignment data or rules and don’t publish, a warning icon appears next to the Last Published text. If the publish process fails, the warning icon remains next to this text.

**Publishing Using the Publish Assignment Information Process**

You can run the Publish Assignment Information and Refresh Candidate Cache scheduled process to publish assignment information. You can schedule this process daily, weekly, and so on, based on the frequency of changes to assignment information, including assignment rules. Consider how often the assignment data will change and how critical it is to have these changes available for use in assignment.

You can use the publish assignment information process when there are a large number of assignment rules (about 100 to 1000) and when there are multiple users making changes to rules at the same time.

To run this process:

1. Click **Navigator > Scheduled Processes**.
2. Click the **Schedule New Process** button.
3. On the Schedule New Process window, select **Publish Assignment Information and Refresh Candidate Cache** process from the **Name** list, and click **OK**.
4. On the Process Details page, select the application from the **Application** list.
5. Select the **Publish** check box.

   **Note:** The **Candidate Object** and **Owner Module** fields don’t apply to this process.

6. Click **Submit**.

This process publishes all assignment information for the selected application so that it is available for use in assignment processing. You can use the Scheduled Processes page to monitor this process and to view the log file.

**Account Assignment**

**Account Assignment: Overview**

An account represents a company you sell to. If your business sells to a contact or household, an account represents the contact and household you sell to. Assignment manager enables you to assign territories related to your sales accounts, including customers, prospective customers, individual contacts, and households. You can use assignment rules defined for accounts only to filter the territories that are assigned to accounts.

**Enabling Multiple Classification Types**

**Video**

**Watch:** This video tutorial shows how to use multiple organization types, industries classification types, and auxiliary classification types for account assignment.
Procedure
This worked example shows you how to enable multiple organization types and industries classification types for account assignment. It also shows you how assignments are run on an account based on these classifications.

It covers the following tasks:

- Using multiple organization types for account assignment
- Using multiple industries classification for account assignment
- Running assignment manager on an account

Note: Before you start these procedures, you must ensure that the All Organization Types and All Industries fields are shown on the Profile tab of the Accounts page.

Using Multiple Organization Types for Account Assignment
1. Sign into the application as a Sales Administrator and go to the Setup and Maintenance work area.
2. Search for the Manage Customer Center Assignment task.
3. Select the Account row.
4. Select the Candidates tab of the Account: Details table and then the Account Territory row. This row contains mapping information about the account.
5. Select the Account Territory: Mapping Sets tab. This tab shows the organization type and industries type.
6. Select the row corresponding to Organization Type in the Work Object Attribute Low column and click Edit. The Edit Mapping Page opens where you can edit the organization mapping to update the work object.

Use default values for fields unless the steps specify other values.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Object</td>
<td>Account Organization Type</td>
</tr>
<tr>
<td>Work Object Attribute: Low</td>
<td>Code Assignment</td>
</tr>
</tbody>
</table>

7. Ensure that the Inactive check box is clear, so that the mapping remains active.
8. Click OK to save the changes.
9. Verify that your updates are active by reviewing the Mapping Sets tables.

The values of the specific dimension that you have enabled using the multiple values for assignment, instead of the primary value, should be Code Assignment.

10. Click Save and Publish. Your changes are published and future territory assignment for accounts is performed using the mapping sets.

Using Multiple Industries Classification for Account Assignment
1. Select the row corresponding to Industry in the Work Object Attribute Low column and click Edit. The Edit Mapping page opens where you can edit the industry mapping to update the work object.

Use default values for fields unless the steps specify other values.
### Oracle Sales Cloud
Implementing Sales

#### Chapter 8
Setting Up Assignment

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Object</td>
<td>Account Industry</td>
</tr>
<tr>
<td>Work Object Attribute: Low</td>
<td>Code Assignment</td>
</tr>
</tbody>
</table>

2. Ensure that the Inactive check box is clear, so that the mapping remains active.
3. Click **OK** to save the changes.
4. Verify that your updates are active by reviewing the Mapping Sets tables.

The values of the specific dimension that you have enabled using the multiple values for assignment, instead of the primary value, should be **Code Assignment**.

5. Click **Save and Publish**.
   Your changes are published and future territory assignment for accounts is performed using the mapping sets.

### Running Assignment Manager on an Account

1. Sign in the application as a salesperson and go to the Accounts list page.
2. Search for the Maple Networks account for which you want to run the assignments based on the mappings.
3. Select the row corresponding to Maple Networks.
   You are in the Edit Accounts: Maple Networks page.
4. Go to the Profile tab.
5. Click **All Industries**.
   You are in the Manage All Industries page.
6. Click Add.
7. Enter Financial Services in the Name field and click **Search**.
8. Select the row corresponding to the Financial Services industry.
9. Click **OK** on the Select: Industry page, and then again on the Manage All Industries page.
10. Click **Save** on the Edit Account page.
    Saving your changes automatically triggers the assignment process and the account is assigned territories based on the mapping sets.

### Territory-Based Account Assignment

#### Sales Account Assignment Object: Explained

Territory-based assignment is the default approach used to give sales people and their managers access to account, contacts and households. It is based on the matching of sales account attributes with sales territory dimensions. You can also add an account owner to the account-territory matching to enable the assignment of a territory based on the account owner.

By default accounts are assigned automatically when the account is created or updates. Alternatively, sales people with access to the account team can run assignment for a specific account. Additionally, account assignment can run in bulk on a scheduled basis. You can also add an account owner to the account territory mapping that enables the application to assign a territory based on the account owner’s territory. For example, if the account owner is mapped to the territory owner, then when you create an account, you are made the account owner.
Multiple Industry and Organization Classifications
You can assign primary and nonprimary industry and organization type values to accounts. When an account is assigned multiple classification values, for the purposes of territory and rule-based assignment, the assignment manager can use all of the values or only the primary account classification. Opportunity assignment also supports multiple classification values.

For more information on assigning accounts using industry classification codes, see the white paper, Assignments Using Nonprimary Classifications (Doc ID 2086014.1) available on My Oracle Support.

Sales Account Assignment Child Objects
The following table lists the sales account assignment child objects:

<table>
<thead>
<tr>
<th>Sales Account Assignment - Child Objects</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Represents a company you sell to</td>
</tr>
<tr>
<td></td>
<td>An account represents a company you sell to. If your business sells to a contact or household, an account represents the contact and household you sell to.</td>
</tr>
<tr>
<td>Account Auxiliary Classification 1</td>
<td>Multiple auxiliary classification codes associated with the account</td>
</tr>
<tr>
<td></td>
<td>Select this child object to enable account assignment by all account auxiliary classification 1 values.</td>
</tr>
<tr>
<td>Account Auxiliary Classification 2</td>
<td>Multiple auxiliary classification codes associated with the account</td>
</tr>
<tr>
<td></td>
<td>Select this child object to enable account assignment by all account auxiliary classification 2 values.</td>
</tr>
<tr>
<td>Account Auxiliary Classification 3</td>
<td>Multiple auxiliary classification codes associated with the account</td>
</tr>
<tr>
<td></td>
<td>Select this child object to enable account assignment by all account auxiliary classification 3 values.</td>
</tr>
<tr>
<td>Account Industry</td>
<td>Multiple industries associated with the account</td>
</tr>
<tr>
<td></td>
<td>Select this child object to enable account assignment by all account industry types.</td>
</tr>
<tr>
<td>Account Organization Type</td>
<td>Organization type classification code assigned to the account</td>
</tr>
<tr>
<td></td>
<td>Select this child object to enable account assignment by all account organization types.</td>
</tr>
</tbody>
</table>

Sales Account Assignment Object Attributes and Corresponding Customer Attributes
The following table lists sales account assignment object attributes and corresponding customer attributes, as shown on the Profile and Classification nodes of the respective information tree.

<table>
<thead>
<tr>
<th>Sales Account Assignment Object Attribute</th>
<th>Corresponding Sales Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geography Identifier</td>
<td>Sell-to Address</td>
</tr>
<tr>
<td>Industry</td>
<td>Primary Industry: The primary classification code for the classification category defined in profile option Industry Classification Category.</td>
</tr>
</tbody>
</table>
Sales Account Assignment Object Attribute | Corresponding Sales Attribute
---|---
Organization Type | Primary Organization Type: The primary classification code for the classification category Organization Type defined in profile option Industry Classification Category.
Organization Size | Organization Size
Named Account Type | Named Sales Account Indicator
Party ID | Party ID
Auxiliary Dimension 1 | The primary classification code for the classification category defined in profile option Industry Classification Category for Auxiliary Dimension 1.
Auxiliary Dimension 2 | The primary classification code for the classification category defined in profile option Industry Classification Category for Auxiliary Dimension 2.
Auxiliary Dimension 3 | The primary classification code for the classification category defined in profile option Industry Classification Category for Auxiliary Dimension 3.

Related Topics
- Accounts, Contacts, and Households: Overview

Assigning Primary and Nonprimary Classifications: Explained
As a sales administrator, you have the ability to configure account assignment to enable primary and nonprimary industry codes, organization types, and classification values.

Enabling Organization Type and Industry Classification Values
To enable the organization type and industry classification values:

1. Sign in as the sales administrator or as a setup user.
2. In the Setup and Maintenance area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Customer Center Assignment Object
3. Click the Manage Customer Center Assignment Object link.
   The Manage Customer Center Assignment Object page appears.
4. Select the Account object.
5. In the Account: Details region, select the Candidates tab and then select Account Territory.
7. In the Mappings region, select the work project.
8. Click Edit.
   The Edit Mapping pane appears.
9. Make the required changes and click OK.
10. Click Save and Publish to activate the mapping to enable assignment by all classification values.
Sales Account Assignment Profile Options: Explained

The following profile options influence the behavior of sales account assignment:

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Default Value</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment Rule for Account Territory Assignment</td>
<td>Null</td>
<td>Specifies the assignment rule that defines the sales territory that is assigned to an account.</td>
</tr>
<tr>
<td>Account Types Enabled for Assignment</td>
<td>ZCA_CUSTOMER</td>
<td>Enables one or more account types for territory assignment. Applicable types are Account Type standard lookup values. Use comma-delimited string for multiple values.</td>
</tr>
<tr>
<td>Sales Account Automatic Assignment on Import Enabled</td>
<td>N</td>
<td>Enables automatic territory based assignment after sales accounts are imported. If disabled, manually run a batch assignment or assign each sales account individually.</td>
</tr>
<tr>
<td>Disable updating Last Assign Date when there are no territory changes</td>
<td>N</td>
<td>Disables Stamping of Last Assign Date when there are no territory changes.</td>
</tr>
<tr>
<td>Sales Account Automatic Assignment on Create Enabled</td>
<td>Y</td>
<td>Enables automatic territory based assignment processing after a sales account is created.</td>
</tr>
<tr>
<td>Sales Account Automatic Assignment on Update Enabled</td>
<td>Y</td>
<td>Enables automatic territory based assignment processing after a sales account is updated.</td>
</tr>
</tbody>
</table>

Account Territory Member Access: Explained

Access for the territory owners and members are the same as that of the team members.

These access levels control the internal and partner territory privileges for the account:

- Internal territory owner: Full access
- Internal territory members (nonowner): Edit access
- Partner territory owner and members: View-only access

⚠️ Note: You must implement Territory Management before you can access territory owners.

Account Assignment Scheduled Processes

Scheduling Account Assignment: Explained

The Request Account Assignments scheduled process can be scheduled and run on the Scheduled Processes page. You must have the Run Sales Party Batch Assignment privilege to define and run account batch assignment.
To access the Scheduled Processes page, click **Navigator**. In the **Tools** heading, click **Scheduled Processes**.

1. Click **Schedule New Process**, then click type **Job**.
2. Select the process named **Request Account Assignment**. If needed, use the Search link on the Search window.
3. Enter your process details. The following table shows the view criteria and its description, as well as any bind values that are required.

   - **Work Object**: SalesAccount_Work_Object
   - **Candidate Object**: SalesAccountTerritory_Candidate_Object
   - **Assignment Mode**: Territory
   - **View Criteria Name**: (as shown in the following table)
   - **View Criteria Bind Values**: (as shown in the following table)

<table>
<thead>
<tr>
<th>View Criteria Name</th>
<th>View Criteria Description</th>
<th>View Criteria Bind Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>SalesAccountsUpdatedSinceVC</td>
<td>Use this view criteria to assign accounts which have not been previously assigned and have LASTUPDATED_DATE is greater than or equals the specified date and LASTASSIGNED DATE is empty or LASTASSIGNED_DATE is less than or equal to the specified date.</td>
<td>BindLastUpdateDate= [YYYY-MM-DD HH:MM:SS]</td>
</tr>
<tr>
<td>SalesAccountsAssignedBeforeVC</td>
<td>Use this view criteria to reassign accounts which have been previously assigned and have LASTASSIGNED_DATE (in the ZCA SALESACCOUNTS table) less than the specified date.</td>
<td>BindLastAssignedDate= [YYYY-MM-DD]</td>
</tr>
<tr>
<td>SalesAccountTerritoryBatchReassignmentVC</td>
<td>Use this view criteria to reassign accounts impacted by the specified territory and territory dimensional realignment batch. This view criteria is also used internally to initiate immediate/automatic assignments after territory proposal activation and territory dimension updates.</td>
<td>BindReassignmentBatchId= [Territory Reassignment Batch ID]</td>
</tr>
<tr>
<td>SalesAccountBulkImportVC</td>
<td>Use this view criteria to assign accounts created in a given customer import batch. This view criteria is also used internally to initiate immediate/automatic assignments after customer import.</td>
<td>BindReassignmentBatchId= [Import Activity ID]</td>
</tr>
<tr>
<td>SalesAccountDimsForPartyVC</td>
<td>Use this view criteria to assign the account with the specified account ID.</td>
<td>BindPartyId= [Sales Account ID]</td>
</tr>
</tbody>
</table>

4. Define a schedule as needed using the **Advanced** button on the Process Details page. You can schedule the process to run as soon as possible, or to run at a given frequency and start date.
5. Submit your job and monitor it using the Scheduled Processes list, refreshing it to view the latest status updates.
FAQs for Account Assignment

When are territories assigned to accounts?

Internal territories are assigned to accounts in the following scenarios.

- When accounts are created.
- When a sell-to address is added to an existing sales party.
- When accounts are imported in bulk.
- When certain attributes on accounts that correspond with territory assignment dimensions are updated.
- When batch assignment is run.
- When you select the Assign Territories menu action on the Sales Account Team node for the account.
- When territories are realigned or when personnel leave the territory or the company.
- When a sales manager reassigns all of the sales representative's account to a different owner that triggers the reassignment of territories for those accounts to the new owner.

**Note:** The following profile options determine whether territory assignment and reassignment is automatic for accounts. The default setting for both is YES.

- Sales Account Automatic Assignment on Create Enabled
- Sales Account Automatic Assignment on Update Enabled

Automatic assignments are always enabled following an import, party merge and territory realignment. During initial implementation and migration, it is possible to create accounts before territories have been set up in the application. These accounts will not receive any territory assignment because there are no territories. These accounts need to be explicitly assigned when territories are configured and activated in the application. This is one exception which does not have immediate/automatic assignment. The recommendation is to run a batch assignment to assign these accounts created at the beginning of the implementation using the view criteria `SalesAccountsUpdatedSinceVC`.

When you make a field conditionally required on an account, then add the following groovy script before adding your business logic:

```groovy
if (userName==’FUSION_APPS_CRM_SOAPPID’ || userName()==’FUSION_APPS_CRM_ESS_APPID’)
    return false
```

Partner territories get assigned to accounts in the following scenarios.

- When a partner-generated lead is approved, all partner territories associated to the partner-generated lead are automatically assigned to the account.
- Users with the privilege Manage Sales Party Partner Territory can assign partner territories from the account team UI.

**Note:** Territory Management must be implemented to use this feature.

Related Topics

- Account Team Member Access Levels: Explained
How can I add territories to an account?

Sales assignment capabilities match territories and accounts based on assignment setup. An account can also be assigned to one or more internal and partner territories.

You can assign internal territories, such as Prime, Overlay, as well as Sales Channel Manager territories, matching a given account's assignment attributes, to the account. By default, Internal territory assignment runs immediately and automatically whenever account assignment or reassignment is required. For example, you can run assignment processing when you create or update an account.

You can run territory assignment when viewing or editing your accounts. Just navigate to your account details, verify relevant attributes like address, industry, and so on and run the assignment process manually using the Action button.

Additionally, you can run account assignment in a batch on a scheduled or one off basis, or following a territory realignment.

Partner territories are applicable to sales partner management implementations. When you approve a partner lead, any partner territories associated to the lead are automatically assigned to the lead's account. Channel managers can also select specific partner territories to assign to an account with the Add Partner Territories action on the Account Team page.

Related Topics

• Territories Defined by Dimensions: Explained

Opportunity Assignment

Opportunity Assignment: Overview

Sales resources (team members) are assigned to an opportunity either automatically by the assignment process, or when you add them to the sales team while editing an opportunity.

The following sections discuss different ways to assign sales resources to an opportunity.

Scheduled Processing

The preferred way to assign sales resources to an opportunity is using a scheduled process, also known as a batch process or batch method. There are two predefined scheduled processes for opportunity assignment as follows:

• Revenue Territory Territory Based Assignment: Use this process to run territory-based assignment on opportunity product lines. During this process, the application evaluates every product line in the opportunity batch. Territories whose dimensions match the dimensional attributes of a given product line are then assigned to that line.

• Opportunity Resource Rule Based Assignment: Use this process to run rule-based assignment on opportunities. During this process, assignment processing executes a set of rules, as defined in the profile option, Sales Team Member Assignment Rule Set Group, to find matching candidates for opportunities. If matching candidates are found, they are added to the opportunity team. Note that team members for whom lock assignment is disabled will be replaced if they no longer match the assignment rules.

⚠️ Caution: These scheduled processes should not be requested to run in parallel against the same opportunity batch, to avoid potential locking issues. The scheduling service checks for such incompatibilities prior to initiating the assignment process.
Manually Assigning and Re-assigning

Users with Full access to an opportunity can manually assign or re-assign sales team members, including the opportunity owner. If an opportunity is re-assigned to a new owner manually, the original owner stays on the sales team as a non-primary team member, unless he is manually removed from the team.

Real Time Assignment Processing Action

From within an opportunity, sales representatives can use the assign opportunity action to run assignment processing to automatically assign, in real time, resources to the opportunity. Based on the setting of the profile option, Opportunity Assignment Mode, assignment processing uses territory-based assignment, rule-based assignment, or both.

Automatic Assignment On Saving an Opportunity

If the profile option, Assignment Submission at Save Enabled, is yes, when you save an opportunity, assignment processing runs assignment on the opportunity. In a similar way that on-demand assignment happens, assignment processing uses territory-based assignment, rule-based assignment, or both, based on the profile option, Opportunity Assignment Mode.

Territory-Based Opportunity Assignment

Setting Opportunity Assignment Profile Options

Whether you are using territory-based assignment or rule-based assignment or both to assign resources to opportunities, initially in your implementation you should validate the setting of the following two profile options: Opportunity Assignment Mode and Assignment Submission at Save Enabled.

Setting Opportunity Profile Options

Use the following procedure to set opportunity profile options:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Opportunity Profile Options

2. In the search region of the Manage Opportunity Profile Options page, select **Opportunity Management** as the application, or just enter the profile option name directly in the **Profile Display Name** field.

3. In the list that is returned, click on the profile option to retrieve the details about the profile option.

4. Set the profile option as needed.

The following profile options influence the behavior of territory-based opportunity assignment:

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Default Value</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity Assignment Mode</td>
<td>Territory-based Assignment Only</td>
<td>Specifies the type of assignment processing performed for opportunities. The available options are Territory-based Assignment Only, Rule-based Assignment Only, and Both (which runs both rule based and territory based assignment).</td>
</tr>
<tr>
<td>Profile Option Display Name</td>
<td>Default Value</td>
<td>Effect</td>
</tr>
<tr>
<td>--------------------------------------------------------------</td>
<td>---------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Assignment Submission at Save Enabled</td>
<td>No</td>
<td>Specifies whether to run assignment on an opportunity when it is saved in the UI. If you want assignment to run anytime users save an opportunity, set the profile option to Yes.</td>
</tr>
</tbody>
</table>
| Territory Based Resource Assignment Style                    | All           | Specifies if all members of the territory should be added to an opportunity team or just the owner, or if all (owner and members of the territory) should be excluded from the opportunity team. Options are as follows:  
- All assigns the territory owner and all team members  
- Owner only assigns the owner  
- Exclude All ensures that territory owner or territory members are not added to the opportunity team |
| Territory-Based Assignment Rule Category                     | None          | Specify the rule category used for rule filtering during opportunity territory-based assignment. |
| Opportunity Resource Deal Protection Period                  | 0             | Specifies the default number of days that territory resources are protected to stay on a deal, even if ineligible through territory realignment. |

**Related Topics**

- Accessing Tasks to Update Existing Setup Data: Procedure

**Opportunity Team Profile Options: Points to Consider**

Set profile options to specify the following for opportunity team functionality:

- The default access level for internal resources added to the sales team  
- The default function for internal resources added to the sales team  
- The default access level for partner resources added to the sales team  
- The default function for partner resources added to the sales team

**Opportunity Team Profile Settings**

The following table lists the profile options that affect opportunity team assignment and other team functionality.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Default Value</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal Resource Sales Team Access Level Default</td>
<td>Edit</td>
<td>Determines the default access level for an internal resource added to the sales team.</td>
</tr>
<tr>
<td>Internal Resource Sales Team Function Default</td>
<td>Integrator</td>
<td>Determines the default function for an internal resource added to the sales team.</td>
</tr>
<tr>
<td>Profile Option Display Name</td>
<td>Default Value</td>
<td>Effect</td>
</tr>
<tr>
<td>----------------------------------------------------------------</td>
<td>-------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Partner Resource Sales Team Access Level Default</td>
<td>No Access</td>
<td>Determines the default access level for partner resources added to the opportunity sales team.</td>
</tr>
<tr>
<td>Partner Resource Sales Team Function Default</td>
<td>Integrator</td>
<td>Determines the default function for partner resources added to the opportunity sales team.</td>
</tr>
</tbody>
</table>

**Deal Protection on Opportunities: Explained**

When a sales territory is assigned to an opportunity product line, the application copies over the territory resources (salespeople) to the opportunity sales team. When territory realignment happens, ineligible territory resources are removed from the sales team, unless you enable deal protection. You enable deal protection by setting the profile option, Opportunity Resource Deal Protection Period (MOO DEAL_PROTECTION_PERIOD). The profile option is set to 0 by default.

**Note:** When you set the deal protection profile option, all existing sales team members are protected from realignment for the number of days for which deal protection is in effect.

**Enabling Deal Protection**

To enable deal protection, perform the following steps:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Opportunity Profile Options

2. From the Search region of the Manage Opportunity Profile Options page, enter *Opportunity Resource* in the **Profile Display Name** field.

3. In the MOO DEAL_PROTECTION_PERIOD: Profile Values region, in the **Profile Value** field, enter number of days you want the deal protection to be in effect for. For example, enter 15 if you want the deal protection to be in effect for 15 days.

4. Click **Save and Close**.

**Related Topics**

- Accessing Tasks to Update Existing Setup Data: Procedure

**Sales Credit Recipient and Forecast Territory Defaulting Logic: Explained**

The application uses rules to set default sales credit recipients and forecast territories.

When a product line is first added and saved on an opportunity, the application sets the line creator as the sales credits recipient at 100 percent. You can edit the default credit allocation, and you can add additional sales credit recipients as needed.

**Note:** Nonrevenue credit recipients are never set by default and must be added manually.

After opportunity assignment is run, the application processes the existing credit allocations for each assigned product line to make sure that only an eligible territory is set as the forecast territory, and that the credit recipient is an eligible resource from
the forecast territory. This process is important because the revenue or nonrevenue sales credit amounts are automatically rolled into the territory’s forecast when the product line is added to the forecast.

**Default Forecast Territory Logic**
When setting the default forecast territory, the application uses the following logic:

- Keep the forecast territory the user selected, as long as it is still assigned to the product line and its forecast participation type matches the sales credit type.
- Use the existing credit recipient to derive the forecast territory, whenever possible.

When setting default forecast territory:

- If the current forecast territory for the sales credit is one of the assigned territories with a matching forecast participation type, the application leaves it unchanged.
- If there is only one territory with a matching forecast participation type, the application sets that territory as the forecast territory.
- When there are multiple territories with a matching forecast participation type, the application chooses the forecast territory using the following precedence:
  - Territory where the existing credit recipient is the owner
  - Territory where the existing credit recipient is a member
  - Territory with a matching forecast participation type with the latest effective start date
- When there is no matching territory, the application sets the forecast territory to null (this implies that there is a gap in the territory hierarchy). If the forecast territory for a sales credit allocation has been set to null and opportunity assignment was done from the UI, a warning message appears.

**Default Credit Recipient Logic**
Generally, a sales credit recipient selected by the user does not get replaced by the application unless he is no longer a qualified credit receiver. The application does not change the recipient if:

- The Lock Owner setting for the revenue item is enabled.
- The current credit recipient is under deal protection.
- The current credit recipient is an owner or member of the forecast territory.

If the preceding criteria are not met, the application sets the forecast territory owner as the new credit recipient.

**Related Topics**
- Sales Credits: Overview
- How can I lock in a sales credit recipient
- Setting Opportunity Revenue Forecast Criteria

**Opportunity Assignment Scheduled Processes**

**Assignment Processes for Opportunities: Points to Consider**
Two processes are involved in opportunity assignment. You use one for territory-based assignment and one for rule-based assignment.
The two opportunity assignment processes related to assignment are:

- Revenue Territory Territory Based Assignment Process: Run this process if you are using territory-based assignment.
- Opportunity Resource Rule Based Assignment Process: Run this process if you are using rule-based assignment.

**Note:** You run processes from the Scheduled Processes page, available from the navigator. You must have the role of Sales Administrator or a setup user to run scheduled processes.

When setting up the processes, you must enter specific **View Criteria** names and their **Bind Values**. The following sections list the parameters to use and some examples.

### Revenue Territory Territory-Based Assignment Process

The following table identifies the view criteria and view criteria bind values available for the opportunity revenue territory territory-based assignment process.

<table>
<thead>
<tr>
<th>View Criteria Name</th>
<th>View Criteria Description</th>
<th>View Criteria Bind Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>OpenOpportunities ByCreationDate</td>
<td>Revenue lines of open opportunities created in the last 90 days.</td>
<td>• BindOptyCreationDateTo = [date], BindOptyCreationDateFrom = [sysdate-90]</td>
</tr>
<tr>
<td></td>
<td>Note: The view criteria bind values do not need to be entered for the default date range, 90 days. You can pass a different date range by entering View Criteria Bind Values.</td>
<td>• For example: BindOptyCreationDateTo = 2015-02-29, BindOptyCreationDateFrom = 2015-01-01</td>
</tr>
<tr>
<td></td>
<td>Note: For example: BindOptyCreationDateFrom = 2015-01-01 This second example will process all open opportunities created between January 1, 2015, and the current date.</td>
<td></td>
</tr>
<tr>
<td>OpenOpportunities ByEffectiveDate</td>
<td>Revenue lines of open opportunities that have an expected close date in the last 90 days. Optionally, the user can enter a different date range.</td>
<td>• BindEffectiveDateFrom = [sysdate], BindEffectiveDateTo = [sysdate [90]]</td>
</tr>
<tr>
<td></td>
<td>Note: For example: BindEffectiveDateFrom = 2015-01-01, BindEffectiveDateTo = 2015-02-29</td>
<td></td>
</tr>
<tr>
<td>SalesAccountUpdated InLastNDays</td>
<td>Revenue lines of all open opportunities whose sales account was updated in the last 30 days. Optionally, the user can enter a different number of days.</td>
<td>• BindSalesAccountUpdatedSince = [30]</td>
</tr>
<tr>
<td></td>
<td>Note: For example, opportunities whose sales account was updated in the last 15 days: BindSalesAccountUpdatedSince = 15</td>
<td></td>
</tr>
<tr>
<td>OpenOpportunitiesUpdated InLastNDays</td>
<td>Revenue lines of all open opportunities updated in the last 30 days. Optionally, the user can enter a different number of days.</td>
<td>• BindOptyUpdatedSince = [30]</td>
</tr>
<tr>
<td></td>
<td>Note: For example, open opportunities updated in the last 15 days: BindOptyUpdatedSince = 15</td>
<td></td>
</tr>
<tr>
<td>FilterByBatchTag</td>
<td>Revenue lines of all open opportunities that contain a specific value in the Batch Tag field.</td>
<td>• BindBatchTag = [text]</td>
</tr>
<tr>
<td></td>
<td>For example, open opportunities that have EMEA in the Batch Tag field:</td>
<td>BindBatchTag = EMEA</td>
</tr>
<tr>
<td>RevenuelImportCriteria</td>
<td>Revenue lines of all opportunities imported through the given bulk import batch ID. The view criteria bind value, BatchId, is mandatory.</td>
<td>• BindBatchId</td>
</tr>
<tr>
<td></td>
<td>Note: For example: BindBatchId = 5618782</td>
<td></td>
</tr>
<tr>
<td>View Criteria Name</td>
<td>View Criteria Description</td>
<td>View Criteria Bind Values</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| ClosedOpportunitiesByCreationDate         | Revenue lines of closed opportunities created in the last 90 days. Optionally, the user can enter a different date range. | • BindOptyCreationDateTo =\([date]\), BindOptyCreationDateFrom =\([sysdate-90]\)  
• For example: BindOptyCreationDateTo =2015-02-29, BindOptyCreationDateFrom =2015-01-01 |
| ClosedOpportunitiesByEffectiveDate       | Revenue lines of opportunities closed in the last 90 days. Optionally, the user can enter a different date range.          | • BindEffectiveDateFrom =\([sysdate]\), BindEffectiveDateTo =\([sysdate-90]\)  
• For example: BindEffectiveDateFrom =2015-01-01, BindEffectiveDateTo =2015-02-29 |
| FilterByOptyNumber                        | Revenue lines of an opportunity with a specific number.                                     | • BindOptyNumber=\(<XYZ>\)  
• BindOptyNumber=17001                                                                  |

### Opportunity Resource Rule-Based Assignment Process

The following table identifies the view criteria and view criteria bind values available for the opportunity resource rule-based assignment process.

<table>
<thead>
<tr>
<th>View Criteria Name</th>
<th>View Criteria Description</th>
<th>View Criteria Bind Values</th>
</tr>
</thead>
</table>
| OpenOpportunitiesUpdatedInLastNDays       | All open opportunities which were updated in the last 30 days. Optionally, the user can enter a different number of days. | • BindOptyUpdatedSince=\([30]\)  
• For example, opportunities updated in last 15 days: BindOptyUpdatedSince=15 |
| OpportunityForImportBatchVO               | All opportunities imported through the given bulk import batch ID. Value for BatchId is mandatory. | • BindBatchId  
• For example: BindBatchId=5618782                                                        |
| OpenOpportunitiesByCreationDate           | Open Opportunities created in the last 90 days. Optionally, the user can pass a different date range. | • BindOptyCreationDateTo [sysdate], BindOptyCreationDateFrom [sysdate-90]  
• For example: BindOptyCreationDateTo=2015-02-29, BindOptyCreationDateFrom=2015-01-01 or BindOptyCreationDateFrom=2015-01-01 This second example will process all open Opportunities that were created between January 1, 2015 and the current date. |
| OpenOpportunitiesByEffectiveDate          | Open opportunities that have an expected close date in the last 90 days. Optionally, the user can pass a different date range. | • BindEffectiveDateFrom [sysdate], BindEffectiveDateTo[sysdate [90]] |

[197]($ORACLE$)
### Opportunity Assignment Implementation Considerations

Consider the following points when scheduling opportunity batch assignment processes:

- **Multiple Revenue Territory Territory Based Assignment and Opportunity Resource Rule Based Assignment processes cannot run at the same time.** If one of the processes is running and you submit another process (either Revenue Territory Territory Based Assignment or Opportunity Resource Rule Based Assignment), then the second process have a Paused status until the first job completes. Once the first process completes, the second process will start.

- **For date-based view criteria, for example, OpenOpportunitiesByEffectiveDate, the view criteria bind values do not need to be entered if the default date range is used.**

- **For number-of-days-based view criteria, for example, OpenOpportunitiesUpdatedInLastNDays, the view criteria bind values do not need to be entered if the default number of days is used.**

- **When entering view criteria bind values the date format is YYYY-MM-DD.**

- **When scheduling opportunity batch assignment processes for the first time, if a process errors, you can try rescheduling the process and entering a lower value for the Maximum Sub Processes per Process parameter. The default value is 10. This ensures that each batch contains a small number of opportunities or revenue lines. If there is an issue with one of the opportunities or revenue lines, then the appropriate subprocess will an error status and the other subprocesses will complete successfully.**

For more information on opportunity assignment, see the help. Use keywords "assignment", "territory-based assignment", and "rule-based assignment".

### Running Territory Assignment Process for Opportunities: Procedures

The batch process, Revenue Territory Territory Based Assignment, evaluates opportunity revenue lines and matches eligible territories and their salespeople to the revenue lines. Use the following procedures to run the process and monitor its success.
Prerequisites
Following are the prerequisites to successfully assign resources to opportunities using this process:

- The organization hierarchy exists with valid resources.
- Live territories exist.
- Open opportunities exist with open revenue lines.
- Territory attributes match attributes of open opportunity revenue lines.
- The profile option, Opportunity Assignment Mode, is set to either Territory-Based Only or Both (not Rule-Based Assignment).
- You run the process as a user with the Sales Administrator job role.

Finding the Process
Find the process as follows:

1. Sign in as the sales administrator and navigate to Scheduled Processes.
3. In the Schedule New Process window, click the drop-down list next to the Name field and click Search.
4. In the Search dialog, enter the first three letters of the process name, `Rev`, and click **Search** as shown in the following figure. Note that the search is case sensitive.

5. Select the process name in the results that are returned and click **OK**.
6. Click **OK** again, if needed.
7. The Process Details window appears, where you will enter parameters using the steps in the following section, Entering Process Parameters.

   **Entering Process Parameters**

   Enter the process parameters in the Parameters tab of the Process Details window. The process parameters are called "view criteria" in the UI.
Since there are many different options when setting up the view criteria, here we are going to use a simple view based on opportunity creation date. When entering the data, remember that the values are case sensitive, and no spaces are used.

1. In the View Criteria Name field, enter `OpenOpportunitiesByCreationDate` as shown in the following figure.

2. In the View Criteria Bind Values field, enter `BindOptyCreationDateFrom=2014-01-01`. This value captures all open opportunities created since January 1, 2014. The format must be `yyyy-mm-dd`.
   - To specify a date range, enter `BindOptyCreationDateFrom=<date>, BindOptyCreationDateTo=<date>`. Note the From and To values are separated by a comma.
   - Leave the field blank to capture opportunities in the default date range, the past 90 days.

3. For the purposes of this example, leave the remaining fields at their default values.

4. Next, schedule the process to run, as described in the following section, Scheduling the Process.

Scheduling the Process

Set the process to run either on a schedule or immediately in the Schedule tab of the Process Details window (available within Advanced options).

1. Click the Advanced button in the Process Details window.
2. Click the Schedule tab.
3. You can run the process on a schedule using the Using a schedule option and entering the schedule information. However, for the purposes of this example, we are going to run the process immediately. Click the As soon as possible option.
4. Click **Submit**.

5. If the process submitted successfully, a confirmation message appears with the request number (process ID). Make note of this ID to use it in the next step, Viewing Details of the Process Submission. Click **Ok** on the confirmation message dialog.


**Viewing Details of the Process Submission**

You can view details of the process submission, to make sure it ran without errors and to see how many records were processed.

1. Back in the Scheduled Processes page, enter the process name, Revenue Territory Territory Based Assignment Process, in the **Name** field and click **Search**.

   - Alternatively, you can enter the process ID in the **Process ID** field and click **Search**.

2. In the search results that are returned, click on the job name to view details of the submission. The submission details include such information as:

   - Start date and time
   - Whether the job completed successfully
   - Parameters used in the job
   - Log file containing additional details like the number of work objects processed successfully or with errors and any error messages if the job was not successful

**Rule-Based Opportunity Assignment**

**Video**

![Watch](image)

This video tutorial shows how to create rules to randomly assign resources to opportunities. The content of this video is also covered in text topics.

**Procedures**

Assignment rules are created using rule sets, rules, conditions, and actions. The assignment engine uses rules to evaluate and recommend candidate assignments for specified work objects. This topic outlines how to edit rules, and run assignment to randomly assign resources to opportunities.

A rule category is predefined for each type of rule-based assignment processing supported by each sales application object. For example, the rule category Sales Team Member Recommendation Default Rule Category is predefined for resource rule-based assignment of Opportunities. When the filter is set to **Random**, a random selection of matching candidates is assigned to the work object.

Rules exist to assign any opportunity for software products in the California locations to Scott and Lisa, and server products to Tracy and Bill. Currently the rules are configured to randomly assign one of the sales representatives to opportunities in different locations. You now want to update these rules to include new sales locations in San Diego and Sacramento.
Editing Assignment Rules

Modify assignment rules as follows:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Opportunity Assignment Manager Rules

2. In the Manage Opportunity Assignment Manager Rules page, select the category where your existing rules were created, in this case **Sales Team Member Recommendation Default Rule Category**.

   ✍️ **Note:** Random is selected as the filter type.

3. In the **Conditions** section of the existing rule, update the following details for your object:
   - **Attribute** = Account State
   - **Operator** = Equals
   - **Value** = San Diego
   - **Attribute** = Account State
   - **Operator** = Equals
   - **Value** = Sacramento

4. Click **Save and Publish** to publish the assignment details.

Run Assignment

Mateo Lopez, who is the sales manager for the Western Region logs in to search for new software opportunities from Pinnacle Technologies in the Sacramento location. When he finds an opportunity, he runs the assignment process so that the opportunity is assigned to either one of the sales representatives, Scott or Lisa, as follows:

1. Sign in to the application as a user with access to opportunities, such as a salesperson or sales manager.
2. Navigate to **Sales > Opportunities**.
   - The opportunity landing page displays your opportunities.
3. Find an opportunity and click on it.
4. Click **Actions**.
5. Click **Save and Run Assignment**.
   - Each time you run assignment on this opportunity, it could be assigned either to Lisa or to Scott, because the assignment rule is set to assign resources randomly.
6. Click the **Team** tab to check which sales representative is assigned to the opportunity.

Related Topics

- Accessing Tasks to Update Existing Setup Data: Procedure

Rule-Based Opportunity Assignment Profile Options: Explained

Whether you are using territory-based assignment or rule-based assignment or both to assign resources to opportunities, initially in your implementation you should validate the setting of the following two profile options: Opportunity Assignment Mode and Assignment Submission at Save Enabled.
Setting Rule-Based Opportunity Assignment Profile Options

Use the following procedure to set opportunity profile options:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Opportunity Profile Options

2. From the Manage Opportunity Profile Options page, enter the profile option name directly in the Profile Display Name field.

3. In the list that is returned, click on the profile option to retrieve the details about the profile option.

4. Set the profile option as needed.

The following profile options influence the behavior rule-based opportunity assignment:

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Default Value</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity Assignment Mode</td>
<td>Territory-based Assignment Only</td>
<td>Specifies the type of assignment processing performed for opportunities. The available options are Territory-based Assignment Only, Rule-based Assignment Only, and Both (which runs both rule based and territory based assignment).</td>
</tr>
<tr>
<td>Assignment Submission at Save Enabled</td>
<td>No</td>
<td>Specifies whether to run assignment on an opportunity when it is saved in the UI. If you want assignment to run anytime users save an opportunity, set the profile option to Yes.</td>
</tr>
<tr>
<td>Sales Team Member Assignment Rule Category</td>
<td>None</td>
<td>Specify the assignment rule category used by the automatic assignment process to assign sales team members to opportunities.</td>
</tr>
</tbody>
</table>

Related Topics

- Opportunity Profile Options: Explained
- Accessing Tasks to Update Existing Setup Data: Procedure

Candidate Refresh: Explained

Candidate data, such as resources, are loaded into a cache and used for each assignment request. Rule-based assignment requests that identify matching candidates or scores for matching candidates use candidate data. The candidate data cache can be refreshed at regular intervals using the Publish Assignment Information and Refresh Candidate Cache process scheduled in the Enterprise Scheduling Service (ESS). This process marks the candidate for refresh, and the candidate data is refreshed the next time there is an assignment request using that candidate.

Note: This feature affects rule-based assignment using the rule set types of matching candidates or matching candidates with scoring only.

You may schedule this process daily, weekly, and so on, based on the frequency of changes to the candidates. Consider how often the candidate data will change and how critical it is to have the changes available for use in assignment. For
example, resource details may change daily and therefore the resource candidate data cache for managing leads may need to be updated once every day.

The refresh cache process has the following parameters that you must enter:

<table>
<thead>
<tr>
<th>Candidate Object</th>
<th>Owner Module</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource_Candidate_Object</td>
<td>Sales</td>
</tr>
<tr>
<td>Resource_Candidate_Object_Lead</td>
<td>leadMgmt</td>
</tr>
<tr>
<td>ORA_Deal_Resource_Candidate_Object</td>
<td>leadMgmt</td>
</tr>
<tr>
<td>ORA_Queue_Candidate_Object</td>
<td>svcMgmt</td>
</tr>
</tbody>
</table>

**Note:** Do Not enter or select values for the Application and Publish parameters if you want to run the refresh cache process.

For example, there would be one ESS process scheduled for managing leads with the parameter Resource_Candidate_Object_Lead/leadMgmt. Sales would need a process scheduled with the parameter Resource_Candidate_Object/sales.

**FAQs for Opportunity Assignment**

**How are territories assigned to opportunities?**

You can't explicitly add territories to an opportunity. Rather, the assignment engine automatically assigns territories to opportunity product lines by matching the dimensional attributes of product lines to territory dimensions, such as Customer Size or Industry.

When the assignment engine assigns territories to opportunity product lines, the territory owner is also copied to the opportunity team.

Profile options set by the administrator determine the following:

- Whether, when a territory is assigned to an opportunity product line, all territory team members are also copied to the opportunity team, in addition to the territory owner.
- Whether the assign opportunity action is available from within an opportunity for salespeople to run assignment.
- Whether the application runs assignment when salespeople save an opportunity.

**Note:** With partner integration, partner territories (territories whose sales channel dimension is equal to Partner) are not assigned to product lines. Partner organizations can only be associated with an opportunity manually, or they can be automatically associated through an approved lead registration.
How do I assign team members automatically to an opportunity?
While editing an opportunity, from the Actions menu, select Save and Run Assignment.
You must have Full access to the opportunity to see the Save and Run Assignment action.

Tip: You can view assigned territories and the associated territory team members on the opportunity team in the opportunity Team pages.

How can I manually add territories to an opportunity?
You can manually assign territories to one or more additional salespeople on a product line in order to allow another salesperson working the deal to forecast it in his territory. Manual assignment may be required, for example, to even out a temporary unbalanced load between salespeople reporting to a manager, or to accommodate a salesperson on extended vacation.

You manually assign territories in the assign sales credit screens or in the details of the revenue line by using the territory list of values.

You must have the Sales Administrator job role to perform manual territory assignment on opportunities.

Which fields in an opportunity drive assignment?
The following fields drive opportunity assignment: Account, Sales Channel, Product, and Partner (for assigning partner-centric territories).

Other, peripheral, account and partner attributes also drive assignment, but are not captured or displayed in the opportunity. Examples of these other attributes include: Primary Address (Geography), Named/Not Named (Account Type), Industry, Organization Type, Partner Type, Organization/Customer Size, and the Auxiliary 1-3 Classifications.

Why can't I assign an opportunity?
You must have Full permission on an opportunity to see the Save and Run Assignment action.

Note that a profile option determines whether the assignment action is available in opportunities.

What's lock assignment?
Lock assignment prevents a salesperson from being automatically removed from an opportunity through the assignment engine. Only users with Full access on the opportunity can check or deselect the Lock Assignment check box for sales team members.

What's deal protection?
With the deal protection feature, all salespeople are automatically protected from being removed from a product line for which they are receiving sales credit, or from the opportunity team, when territory realignment happens. Deal protection applies to sales resources that get automatically assigned to product lines as credit recipients or to the opportunity team using territory-based assignment.

A profile option set by the administrator specifies the default number of days for which salespeople are protected. An opportunity team member with Full access level can override the dates for which the protection is active.

Lead Assignment
Lead Assignment: Overview

Sales leads require assignment, either in real-time or in batch. Batch assignment runs batch processing that matches lead objects, either one-off or on a scheduled basis.

There are two types of lead assignment:

- Rule-Based Assignment
- Territory-Based Assignment with Rule Filtering

Leads use Territory-Based Assignment to identify matching territories and then set up additional rules (Rule-Based Assignment) to filter the final set of territories that are returned, using any attribute of the work object.

Lead Assignment: Explained

Lead Management provides preconfigured options to automate the process of assigning leads to sales resources, sales territories and partners. The two options for assigning leads are territory-based assignment and rule-based assignment.

Additionally, you can automatically calculate a score for each lead, or determine an appropriate rank or qualify a lead using rule based assignment. To ensure that sales resources are properly assigned to leads, and leads are appropriately scored, ranked or qualified, you create assignment rules. You can select from ready-to-use attributes or configure custom lead attributes to use in lead assignment rules.

Lead Assignment Profile Options: Explained

Lead assignment profile options are configurable options that affect assignment manager application operations. Values defined at the user level take precedence over those at the site level. If a value is not defined at the user level, the site level value is used.

Lead Assignment

The following table lists the profile options that affect the assignment of lead status, rank, score, resources, and territories on the lead. Before setting these profile options, you must perform the tasks listed under Configure Assignment Manager for Lead Processing setup task. From there you can review and update assignment of candidate objects such as rank, qualification status, and resources to leads.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Default Value</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment Rule for Qualifying Leads</td>
<td>None</td>
<td>Specify the rule to evaluate the lead and assign the lead status per rule conditions.</td>
</tr>
<tr>
<td>Assignment Rule for Ranking Leads</td>
<td>None</td>
<td>Specify the rule to evaluate the lead and assign the lead rank per rule conditions.</td>
</tr>
<tr>
<td>Assignment Rule for Rule-Based Lead Assignment</td>
<td>None</td>
<td>Specify the rule to evaluate the lead and assign the sale team resources per rule conditions.</td>
</tr>
<tr>
<td>Profile Option Display Name</td>
<td>Default Value</td>
<td>Effect</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------</td>
<td>--------</td>
</tr>
<tr>
<td>Assignment Rule for Scoring Leads</td>
<td>None</td>
<td>Specify the rule to evaluate the lead and assign a score per rule conditions.</td>
</tr>
<tr>
<td>Assignment Rule for Territory-Based Lead Assignment</td>
<td>None</td>
<td>Specify the rule to evaluate the lead and further filter territories derived using territory-based assignment per rule conditions.</td>
</tr>
<tr>
<td>Lead Assignment Mode</td>
<td>Both</td>
<td>Specify the default assignment mode type allowed during automatic batch assignment. Automatic batch assignment occurs when you select the assign lead action from the UI.</td>
</tr>
<tr>
<td>Lead Batch Reassignment</td>
<td>N</td>
<td>Enable batch lead reassignment, in addition to lead automatic reassignment. For example, when leads are selected for reassignment, they get reassigned when the Request Sales Lead Assignments process next runs using the Reassign process selection criteria.</td>
</tr>
</tbody>
</table>

 Territory-Based Lead Assignment

**Territory-Based Lead Assignment: Explained**

Territory-based assignment relies on an association between attributes on the lead work object and attributes on the lead territory candidate object to match the candidates to the work object. For territory-based assignment, the lead work object and lead candidate object must have attributes that share the same domain of values. The mapped attributes are used for matching appropriate candidates for a work object. For example, a sales lead (work object) has a geographic location attribute. The lead candidate object (territory) has also a geographic location attribute. These two attributes are mapped to each other.

Once lead data is cleansed, created, enriched, and scored, the leads need to be assigned. Leads can be assigned based on several criteria. The following information is available for assigning leads with an associated account:

- Geography (Primary Address of the Account)
- Named account
- Industry - Customer/Organization Size
- Organization Type
- Auxiliary Classifications 1 - 3

The following lead information can also be used:

- Product
- Sales Channel
- Primary sales channel associated with the lead
- Business Unit
- Partner for working with a partner organization
The following information is available for assigning net new leads:

- Geography (Contact Address on the Lead)
- Industry
- Organization Type
- Product
- Sales Channel
- Primary sales channel associated with the lead
- Business Unit
- Partner for working with a partner organization

Leads can be assigned based on several criteria. For example, you can configure assignment management functionality to assign leads based on the following:

- Lead Source
- Geography
- Named accounts, such as the top 20
- Industry
- Product
- Partner for working with a partner organization
- Primary sales channel associated with the lead
- Associated marketing campaign that generated the lead

Components That Affect Lead Assignment

The following lists the components that influence the assignment of leads:

- Lead work objects
- Lead candidate objects
- Attributes
- Mapping and rule conditions

How Leads Are Assigned

Leads can be assigned based on simple rules evaluation. Leads that have an associated account with an address are distributed based on territory definitions. Territory-based evaluation can be supplemented by adding filtering rules to further refine the lead assignment. Territory-based evaluation uses:

- Lead work object
- Territory candidate object data
- Mappings between the territory dimensions and lead dimensional attributes to execute the assignment processing

Lead Assignment Setup

Set up the following for assigning leads:

- Set up the necessary lead work objects, and associated candidate objects to be assigned by assignment management functionality.
A default set of lead work objects and associated candidate objects are predefined.

- Set up rules and rule sets specific to your business requirements. For example, set up an assignment rule to assign leads with deal size less that a certain amount to partners.
- Set up object mappings for territory-based assignment. For example, assign a lead to those territories where Territory dimensional attributes are mapped to corresponding Lead attributes.
- Set up rules to filter territories that match the lead based on additional information on the lead. For example, set up rules to exclude prime sales territories that match leads which are unqualified.

**Territory-Based Assignment**

**Lead Assignment Rules: Explained**

You can specify assignment rules for determining the rank for leads, assigning sales resources to leads, calculating scores for leads, and qualifying leads. This topic provides some examples of how assignment rules are evaluated. It also outlines some basic questions to consider before creating rules.

Assignment rules are created using work objects, candidate objects, attributes, and conditions. You can use multiple types of assignment rules and rule sets for assignment of candidates, such as rank, qualification status, and resources, to the lead. For example, you can specify the assignment rule that assigns resources to sales leads by assigning individual sales resources that meet the rule criteria.

**Assignment Rule Criteria**

An assignment rule can have one or more assignment criteria. For example, all leads, lower than a certain deal size and for a specific product, are assigned to a specific Partner resource. Another example might include assigning only those leads generated from a specific sales campaign, such as a CEO round table discussion event, to a specific salesperson.

**Assignment Rule Considerations**

When designing rules, carefully consider how you want to match the candidates to the lead. For example, would you want resources assigned based on their geographic location, or their product knowledge, or their skill level, or a combination of any of these attributes? Do you want to match candidates only, or would you like to match them and score them to identify the best fit? In a multiple candidate scenario, do you want to assign all matching candidates or only those who achieve higher than a specific score?

**Lead Status: How It Automatically Is Set**

Lead quality is assessed as soon as a lead is generated. This topic describes the settings that are used to determine the qualification status of a sales lead. Lead quality of a newly created lead is based on the following:

- Characteristics of the customer contact on the lead
- Type of response which caused the lead to be generated

Lead quality is further assessed based on added qualification data such as customer need, urgency or time frame for the project, and whether a budget is approved for the product.

**Settings That Affect Lead Qualification Status**

Leads can get their qualification status from:

- Assignment rules
Rules-based leads qualification process helps standardize the lead qualification process. Based on the positive results to conditional rules, the value of the Lead Status attribute is set to Qualified. For example, a rule can be defined to update the lead as qualified if the:

- Customer’s budget status is approved
- Project time frame is three months
- Decision maker is identified
- Response type is that the customer attended an event

- An imported value

Leads imported through file import can include a designated lead qualification status.

How Lead Qualification Status Is Calculated

In some companies, the lead qualification data gathered by lead qualifiers is considered in the scheduled automated process that calculates lead score or lead rank as well as assigning sales team territories. For such companies, a simple rule to move leads to a Qualified status when the lead score reaches a specific threshold is sufficient.

Territory Lead Assignment: Examples

Leads are assigned to the appropriate territories based on matching lead attributes to territory dimensions. This topic provides some examples of the relationship between the assignment of sales leads to territories. It also contains examples of different dimensions used to assign sales leads to the correct sales territories.

A territory is the jurisdiction of responsibility of a sales resource over a set of sales accounts. Use territory-based assignment to assign sales territories to leads.

Assign Territories to Lead Territory Team

Assignment Manager can be set up to automatically assign sales territories to the lead using territories defined in Territory Manager. For example, a salesperson navigates to the leads list and opens the newly created lead. Using the Reassign action, the salesperson accesses the assignment manager feature and selects an option to run automatic assignment immediately to reassign the lead to the appropriate territories.

Territory-based Assignment Mapping

Territory-based assignment mappings are predetermined and are available as part of the Lead Management functionality. Predefined mappings are leveraged for matching the correct territories with each lead. For example, you can map the location attribute on the lead to the geography attribute on the territory. Any territories where the geography value matches the location of the lead is matched and assigned the lead.

Analysis

Ensure you have defined your territory boundary based on dimensions. There is only one set of mappings for a work object and candidate object combination. The mappings for various assignment scenarios (such as assignment of a territory to a lead) must be setup through a mapping that assigns appropriate sales territories to a lead territory team. If the lead needs rule-based assignment, then rule sets are used. If the lead needs territory assignment only, then the rules may not be required.
Examples of Enabling Territory Dimensions
You can enable only the dimensions that your organization requires for defining territories. The following examples illustrate different dimensions used to assign sales leads to the correct sales territories.

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geography</td>
<td>For most of your sales activities, you want to assign salespeople by city and postal code.</td>
</tr>
<tr>
<td>Account</td>
<td>You have a few key accounts that should belong to top salespeople. Use the account dimension to create territories for individual sales accounts.</td>
</tr>
<tr>
<td>Customer Size</td>
<td>One product line is suitable only for organizations above a certain size, and you have a few skilled salespeople for that product line. Use the customer size dimension to assign skilled salespeople to the larger customers for the product line.</td>
</tr>
<tr>
<td>Industry</td>
<td>You sell one type of service to telecommunications companies, another service to utilities, and a third service for insurance companies. You can create territories for each using the industry dimension.</td>
</tr>
<tr>
<td>Product</td>
<td>You sell a product line that requires salespeople to have a high degree of technical knowledge. Create separate territories for this product line.</td>
</tr>
<tr>
<td>Sales Channel</td>
<td>Your sales department prefers to engage partners as indirect sales channel, and telesales functions in addition to the direct sales force. You can create territories for these different sales channels such as telesales, direct, and indirect sales channels.</td>
</tr>
</tbody>
</table>

Lead Assignment Scheduled Processes

Scheduling Lead Processing Activities: Overview
Lead data is generated from a variety of sources and goes through further enrichment based on updates and follow-up activities. As a result, lead quality must be assessed periodically so that leads get distributed to the right salesperson to ensure timely lead follow up and closure. This topic outlines the lead processing activity that sets lead rank, score, and lead qualification status for a selected batch of leads.

Leads are distributed to individual salespeople and sales territories for further qualification and follow-up. The Create Lead Processing Activity page enables you to:

- Define and submit lead processing activities
- Search for and select specific leads to process
- Start or schedule the lead processing activity

Activity Details
You can run your batch assignment in diagnostic mode to view the details of the assignment processing in an output log. The process type determines the type of activity you want to process such as:

- Lead assignment
- Qualification
• Ranking
• Scoring

Each type is associated with appropriate rule categories and assignment rules for the profile option used to activate the lead processing activity, such as, Assignment Rule for Ranking Leads. For example, if you select lead ranking as the process type, then rank assignment rules are used for processing the selected leads.

Lead Selection
You can use filtering criteria for selecting leads as input to the lead processing activity. For example, you can process leads that are unassigned, or leads that have a status of qualified. The selected leads are processed (qualified, ranked, scored, assigned) based on the corresponding assignment rules defined.

Schedule
Lead processing activities are scheduled for the purposes of periodic ranking, scoring, qualification, and distribution of leads. Due to the periodic nature of all lead processing activities, it is necessary to automate the running of these activities. Enter scheduling options such as schedule mode and frequency to determine when the lead processing activity should begin and how often the activity is repeated.

Related Topics
• Running Lead Batch Assignment in Diagnostic Mode: Example

Running a Lead Assignment Process: Example
This example describes running a lead 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. Search for and open the task Manage Lead Processing Activities from 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 previously 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.
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.

Running Lead Batch Assignment in Diagnostic Mode: Example
You can run your batch assignment in diagnostic mode to view the details of the assignment processing in an output log. This topic provides an example of running lead batch assignment in diagnostic mode.

Running Batch Assignment
A sales representative of a company has to follow up on a lead but the lead has not been assigned to his territory. He has requested you, the sales administrator, to investigate the details of territory assignment. You can provide these details by running lead batch assignment in diagnostic mode.

1. Sign in to the application and select Navigator, and then select the Lead Qualification menu item.
2. Select Lead Processing Activities on the Tasks pane.
3. On the Lead Processing Activity page, click the Create Lead Processing Activity button.
4. On the Create Lead Processing Activity page:
   a. Select Assignment from the Process Type list.
   b. Enable diagnostic mode by checking the Diagnostic Mode check box.
   c. Search and select a lead. Note down the lead number value to use in a later step.
   d. Select Immediate from the Schedule list.
   e. Click Submit.
5. On the Confirmation dialog box, click OK.
   Two process are submitted, one for lead territory assignment and the other for lead rule-based (or resource) assignment. Note down the identifier of the territory or resource assignment processes you are interested in.
6. Click the Refresh icon till the process has completed successfully or with an error.
7. Select the appropriate territory or rule-based assignment process, and then click the Output log icon in the View Log column to view details.

Open the log file in another browser window or tab.

Note: The log file format is designed to be viewed in a browser application. If the log file is opened in another application, such as Notepad, the format may not be optimal and the log may be difficult to read.
Rule-Based Lead Assignment

Lead Ranking: Explained
When setting up lead management capabilities, you can predefine criteria to rank leads. You can define lead rank to categorize leads into buckets such as Hot, Warm, or Cool. Although lead rank and lead score aren’t the same, they serve a similar purpose. You can use a score when the lead is quantified. You can then use the score to calculate the lead rank. Lead rank values are used as part of the qualification and assignment process for sales leads. This topic describes the following:

- Creating Ranking Rules
- Calculating Lead Rank Based On Score

Creating Ranking Rules
When a sales lead is created, a lead rank is first calculated based on assignment rules. The ranking classification rule set type determines the rank of the lead based on the values of the attributes on the lead. The following data points are available to help evaluate lead ranking rules:

- All data included on the lead and lead primary product data
- All customer profile data including industry and customer size classifications
- All contact profile data
- All lead qualification data

You can set up a lead rank rule as follows:

1. Navigate to the Setup and Maintenance work area and select Manage Sales Lead Assignment Rules task.
2. Select the Sales Lead Ranking Rule Category.
3. Create a rule set with a rule set type of Classification Rule.
4. Set the work object as lead and the candidate object as lead rank.
5. Create a rule with conditions that match the attribute settings you want a lead to have to give it a rank value.
   For example, you might select the Decision Maker Identified attribute name and then select the equal (=) operator.
6. Enter the value of True.
7. Create any other remaining conditions that you want, and then enter the action for your rule, such as Return the candidate value as Hot.

Calculating Lead Rank Based on a Score
You can schedule when and how often to process lead ranking where the lead rank value or score is calculated and displayed. Ranking rules determine what rank to assign to a lead. You can also create ranking rules that use the lead score as the criteria to name each range of scores with a specific rank. For example, if the lead score is between a value range of 0 and 39, you can create a rule to rank the lead as low priority. If the lead score is between a value of 40 and a value of 60, then create a ranking rule that assigns a medium rank to the lead. The assignment manager engine passes the rank value to the lead management capability and is displayed as a list. You can override the value by selecting a different predefined rank code or value from the list.
Defining the Automatic Assignment of Lead Team Resources: Example

Using a scheduled process, administrators can automatically assign lead team members and appropriate sales territories to leads. The scheduled process accepts criteria to determine the batch of leads to be assigned. During the rule-based assignment phase of the batch process, matching candidates are automatically added to the lead team. During the territory-based assignment phase of the batch process, territories are automatically added to the lead territory team.

This topic outlines how to set up lead assignment tasks and to schedule the tasks in sequence so that you can automate the lead resource assignment process.

Scenario

The automotive sector uses geography data and overall lead quality to periodically assign leads to automotive dealers. You can assign leads automatically by using score and rank criteria before being assigned a resource. Leads are automatically assigned through the assignment manager feature by associating assignment criteria to assignment rules. For example, leads are assigned based on the following criteria:

- Lead source
- Geography
- Lead score
- Named accounts, such as the top 20
- Industry
- Products

When partners must engage with customers to ensure a timely sales follow up, set up assignment manager to automatically assign partner leads to internal channel managers.

Manual Setup Assignment Manager Tasks

You can perform the following manual setup tasks through the assignment manager UI:

- Define lead distribution rules
- Define partner matching rules
- Define the quality parameters to assign leads for follow-up activities
- Set up lead qualification rules
- Set up lead classification rules to assign leads to specific sales channels
- Set up lead routing rules to route leads to sales resources in a selected sales channel
- Set up lead distribution rules to assign leads to a specific salesperson or a partner sales territory

Analysis

Use rule sets if you’re assigning leads by rule-based assignment. If the lead requires territory-based assignment only, then rule sets aren’t used. During a lead import, either ranking or scoring is used as the default qualification criteria. However, if scoring is used to determine the lead rank, then both lead score and lead rank can be used as criteria for assigning lead resources.

Automatic Assignment Manager Tasks in Batch Mode

To automate assigning lead resources, you must schedule and sequence the following order of tasks to occur when assignment manager runs in batch mode:

- Assign leads to a sales channel
• Route leads to sales organizations and sales territories
• Assign leads to individual salespersons or partners

You can also manually assign leads to specific internal or external resources. You can make the following selections:

• Job type
• Rule set
• Filtering criteria for selecting lead

Sales Lead Team Examples
A sales lead team comprises assigned territories and individual team members. This topic provides examples that illustrate some of the features available for the sales lead team:

• Automate assignment of individual resources to sales lead team
• Add ad hoc members to sales lead team
• Update access rights based on the resource
• Change the lead owner

Automate Assignment of Individual Resources to Sales Lead Team
The sales lead team for your company wants to add a support person to the lead. Typically, support people are not part of any sales territory. You can use the Manage Sales Lead Assignment Rules task to set up a rule set for the category, Sales Lead Resource Rule Category. For example, you can assign support team members as individual resources based on rules which match the lead product with specific support team members.

Add Ad Hoc Members to Sales Lead Team
Generally, sales team resources are automatically assigned to leads based on configured assignment rules. The following scenarios provide examples of when you may want to manually add additional team members to assist with the lead.

• The lead owner, who has full access to your company lead, wants to add one of his company’s contractual experts to his team to help pursue the lead. The lead owner manually accesses the resource drop-down list and selects the ad hoc resource that he wants to add to his team.

• When pursuing a lead for an insurance policy, the customer contact requests a unique and complex combination of policy components that require an expert in the company to review. The lead owner adds the expert resource to the lead with full access. Now the expert resource can update the lead with valid combinations of products and services, and, if required, add more team members to the team.

• A salesperson is pursuing a lead that requires the export of products outside the country. He wants to ensure there are no legal issues with exporting the products. The salesperson adds a member of their company’s legal counsel to the lead to review the details before contacting the customer again.

Update Access Rights Based on the Resource
When a resource is added to the sales lead team through rule-based assignment, a profile option determines the member’s default access level. Resources in the management hierarchy of a newly added team member have the same level of access to the sales leads as the team member.

All members of the sales territories assigned to the lead have full access to the lead. Owners of ancestor territories of all sales territories assigned to the lead also have full access to the lead.
Change the Lead Owner

Only the lead owner, or the resources in the management hierarchy of the lead owner, can change the ownership of the lead.

Related Topics

- Sales Users Access to Leads: Explained

Lead Scoring: Example

Use a lead score only when the lead is easily quantified. You might use the score to calculate the lead rank. You can schedule when and how often to perform lead scoring. This topic provides an example of how a lead score is calculated. It also lists the data points used to form part of the overall score evaluation.

How Lead Score Is Determined

Lead scoring capability requires the rules engine to determine a numeric score based on the value of the lead attribute participating in the rule. For example, consider the following rule: If a lead contact is a high level executive, then add a score of 100. If the lead contact is an operations manager, then add a score of 50. When this rule evaluates, it determines the score of the lead based on the job title of the lead contact. After the rules engine evaluates all such rules, the result of the scoring process is the aggregate score, which is then recorded in the Lead Score attribute.

Data Points for Lead Scoring

The following data points form part of the overall score evaluation:

- All data included on the lead and primary product
- Lead source data such as campaign attributes
- All customer profile data including industry
- All contact profile data

Lead Ranking Rule: Example

You can define a lead rank to categorize leads into buckets such as Hot, Warm, or Cool leads. Such categorization of leads enables a salesperson to quickly prioritize leads for follow-up activities. This topic provides an example of how to create a lead rank rule.

Creating a Lead Rank Rule

Your organization wants to assign a rank of Hot to sales leads that have a set time frame and a decision maker identified. The assignment manager capability for leads has predefined the lead work object and lead candidate object. You can set up an assignment rule to determine the appropriate classification to apply a rank to all leads for your organization as follows:

1. From the Manage Sales Lead Assignment Rules page, select the Sales Lead Ranking Rule Category.
2. Select the classification rule type, Sales Lead work object, and Lead Rank as the candidate object.
3. From the Associated Rule Set Groups tab, create a ranking rule and name it Ranking. You can search and select another rule set group (if one exists), to associate with the classification rule type.
4. Set the conditions for each rule that the rules engine checks during assignment processing. For example, enter the following rule conditions:
   - Attribute: Time Frame
   - Operator: Equals
   - Value: Three months
5. Click **Add Row** icon in Conditions and enter the following details:
   - Attribute: Decision Maker Identified
   - Operator: Equals
   - Value: True
   - Action: Return the candidate value as Hot

6. Click **Save and Close**.

The assignment manager:

- Finds the matching leads
- Executes the rules
- Assigns the rank value to the lead

Partner Assignment

Assigning Territories to Partners: Explained

Companies can have thousands of partners, so being able to quickly give users access to partner accounts and to the leads and opportunities for those accounts is very helpful. You can use territory assignment to perform this task.

The available assignment types are:

- Batch assignment
- Manual assignment

You can use the following methods to determine assignment:

- Partner Account Belongs To: For attributes used to match against partner-centric coverage territories
- Partner Account Serves To: For attributes used to match against sales account-centric coverage territories.

You must be on the partner team with full access and have the Partner Account Maintenance or Administration Duty role to perform manual and batch assignment.

All members of the internal territory, including owner and resources, have full access to the partner information. Users with Partner Account Maintenance Duty or Partner Account Administration Duty can view territories assigned to a partner account.

Batch Assignment

After partners are imported, partner accounts created in an import batch can be assigned using view criteria with the Assign Territories to Partner Account assignment process. After territories are realigned, partner accounts that are affected by the realignment are reassigned.

During the initial implementation, partner accounts can be created before any territories have been set up (for example, as part of a migration). These accounts don't receive a territory assignment because no territories exist yet. They must be explicitly assigned after territories are created. In this case, it's recommended that you run a batch assignment using the view criteria "PartnersInABatchNeedingReassignment" to assign these accounts to territories.
Manual Assignment
For manual assignment, use the Assign Territories action available in the Edit Partner page. You must have the Partner Maintenance Duty for the partner to use this action.
When you click the Assign Territories action, assignment processing begins and it returns a list of territories matching the partner. You can save this list and make the assignment, or cancel and make no changes to the existing assigned territories.

Assigning Territories to Partners with Batch Assignment: Worked Example
This topic explains how to assign territories to partners using batch assignment.

Assigning Territories to Partners With Batch Assignment
The following table shows the view criteria names and some example bind variable values to use when configuring batch assignment.

<table>
<thead>
<tr>
<th>View Criteria Name</th>
<th>Bind Variable Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>PartnersOfAStatus</td>
<td>BindStatus= ACTIVE</td>
</tr>
<tr>
<td>PartnersNeedingReassignmentWithStatus</td>
<td>BindStatus= EXPIRED</td>
</tr>
<tr>
<td>PartnersCreatedInLastNDays</td>
<td>BindNumberOfDays= 1</td>
</tr>
<tr>
<td>PartnersUpdatedInLastNDays</td>
<td>BindNumberOfDays= 2</td>
</tr>
<tr>
<td>PartnersNeedingReassignment</td>
<td>No value required (leave empty)</td>
</tr>
<tr>
<td></td>
<td>When you create or update the partner address or partner industry, the Reassign indicator does not reflect the changes. The recommended approach is to use the bind variables PartnersCreatedInLastNDays or PartnersUpdatedInLastNDays.</td>
</tr>
<tr>
<td>PartnersImportedInABatch</td>
<td>BindImportBatchId= 11001</td>
</tr>
<tr>
<td>PartnersImportedInABatchNeedingReassign</td>
<td>BindImportBatchId= 11001</td>
</tr>
<tr>
<td>PartnersInACountry</td>
<td>BindCountryCode=</td>
</tr>
<tr>
<td></td>
<td>For example, the BindCountryCode for the United States is US.</td>
</tr>
<tr>
<td>PartnersBelongingToAnIndustry</td>
<td>BindIndustryBelongedTo= 1000</td>
</tr>
<tr>
<td></td>
<td>Where 1000 is Industry Classification code.</td>
</tr>
<tr>
<td>PartnersWithAProductDim</td>
<td>BindProduct= Education</td>
</tr>
<tr>
<td>PartnersWithA GeographyDim</td>
<td>BindGeographyServed= Netherlands</td>
</tr>
</tbody>
</table>
1. Sign in to the applications.
2. From the Tools area in Navigator, select Scheduled Processes.
4. On the Schedule New Process dialog box, click the drop-down arrow next to Name and then click the Search link.
5. On the Search and Select: Name dialog, type Assign in the Name field and click Search.
6. Select Assign Territories to Partner Account from the returned list and click OK.
7. Click OK on the Schedule New Process dialog.
8. On the Process Details page, enter View Criteria Name and View Criteria Bind Values, then click Submit.
9. The Scheduled Processes page appears. Notice that the Status is Scheduled. You can click the Log link to see the log.

Manually Assigning Partners and Partner Sales Credits in Opportunities: Explained

You can manually add partners to or remove partners from the opportunity team. You also can assign non-revenue sales credit to partners in opportunities. Partner assignment and sales credit allocation follow specific rules.

Partner Assignment to Opportunities

Note the following behavior for partner assignment to opportunities:

- Partner resources cannot be removed from the opportunity team if they are receiving non-revenue credit on the opportunity. To remove a partner, you must first remove the credit allocations he is assigned.
- When a partner organization is removed from the opportunity, and no resource from that partner organization is receiving sales credit on the opportunity, all partner resources, if they exist, are automatically removed from the opportunity team.
- Territories of type Partner or Partner Program are not assigned to opportunities.
- The resources list of values only displays partner resources whose partner organization is already associated with the opportunity.

Sales Credits and Partners

Note the following behavior for partners receiving sales credit:

- Partner resources are only eligible to receive non-revenue credit on opportunity revenue.
- When selecting sales credits for partner resources, only partner resources whose partner organization is associated with the revenue line are eligible for sales credits.
- Partner resources are not eligible for deal protection.

Assignment Reports
Generating Assignment Reports: Example

You can use the Diagnostic Dashboard to generate the following reports:

- Batch Assignment Progress Report
- Batch Assignment Error Report
- Territory Dimension Data Report

This topic explains how to generate a batch assignment progress report, as an example.

Prerequisite: As a user with access to the Schedule Processes UI, such as the sales administrator, click Navigator, and then click Scheduled Processes within the Tools heading. Run the batch assignment processes for sales accounts and opportunities. See the topics, Assignment Processes for Opportunities: Points to Consider and Scheduling Sales Account Assignment: Explained, for more information.

To run diagnostic reports from the Diagnostic Dashboard, the user you sign in as must have the required job or duty roles needed to access the dashboard. The setup user created for you by the service is automatically provisioned with the required job role, Application Diagnostics Administrator (which contains the required duty roles). Therefore, you can use this setup user (or another user that you create and provision with this job role) to run the diagnostic reports. For details on how to add the duty roles to an existing user, see DOC ID 1374930.1 on My Oracle Support (support.oracle.com). This article describes how to assign user access to the Oracle Fusion Applications Diagnostic Dashboard.

Batch Assignment Progress Report: Scenario

This section describes a scenario for running the batch assignment progress report. It takes you through generating a batch assignment report and viewing the completed report.

To generate the batch assignment progress report:

1. Sign in as a user who has access to the Diagnostic Dashboard.
2. Click your user image or name in the global header.
3. Click Run Diagnostics Tests, within the Troubleshooting area.
4. On the Diagnostic Dashboard page, search for the report name you want to run. In this example, search for Batch Assignment Progress Report.
5. Select Batch Assignment Progress Report and click Add to Run.

    The Batch Assignment Progress Report is added in the Choose Tests to Run and Supply Inputs region.
6. Click the warning icon in the Input Status column, and enter the parameters in the Input Parameters page that appears.
7. Click OK.
8. In the Choose Tests to Run and Supply Inputs region, enter a name in the Run Name field and click Run.
9. In the Confirmation dialog box, click OK.

    The status of the report appears in the Diagnostic Test Run Status region.
10. Click the completed report to open the report page.

You can now use the report for your analysis. You can follow the same procedure to generate the other assignment reports listed at the beginning of this topic.
Batch Assignment Progress Report: Explained

You can use assignment management functionality to generate batch assignment progress report. The batch assignment progress report indicates the number of records processed, unprocessed, successful or failed, and the number of records processed per minute for a process. The report provides details of assignment processing for multiple batch assignment processes and their sub-processes. You can run this report while a batch assignment process (accounts, leads, opportunities, revenues, or partner accounts) is running, or after a process has completed.

Access the Diagnostic Dashboard to generate the batch assignment progress report. The report includes two tables, one with details of the main process, followed by details of the sub-processes. The second table with sub-processes appears only if the Include Sub Process parameter is set to True.

Input Parameters

The report has the following input parameters:

<table>
<thead>
<tr>
<th>Input Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent Process ID</td>
<td>The identifiers of parent ESS processes. You can enter multiple process IDs.</td>
</tr>
<tr>
<td>From Date</td>
<td>Select the start date.</td>
</tr>
<tr>
<td>To Date</td>
<td>Select the end date.</td>
</tr>
<tr>
<td>Include Sub Processes</td>
<td>Select True to include sub-processes. The default value is False.</td>
</tr>
</tbody>
</table>

Example Report

The following table shows an example of a batch assignment progress report along with description of what each value means:

<table>
<thead>
<tr>
<th>Column</th>
<th>Sample Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent Process ID</td>
<td>504</td>
<td>Identifier for the ESS process</td>
</tr>
<tr>
<td>Work Object</td>
<td>SalesAccount_Work_Object</td>
<td>The code for the work object</td>
</tr>
<tr>
<td>Candidate Object</td>
<td>SalesAccountTerritory_Candidate_Object</td>
<td>The code for the candidate object</td>
</tr>
<tr>
<td>Submitted By</td>
<td>Sales_admin</td>
<td>Submitted By - user name of the person submitting the process</td>
</tr>
<tr>
<td>Process Status</td>
<td>Running</td>
<td>The status of the process, such as, Not Started, In Progress, Canceled, and so on</td>
</tr>
<tr>
<td>Process Start Time</td>
<td>11/19/12 8:48 PM UTC</td>
<td>Start Time of the process. Shows date, hours, and minutes</td>
</tr>
<tr>
<td>Column</td>
<td>Sample Value</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>--------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Process End Time</td>
<td></td>
<td>End Time of the process. Shows date, hours, and minutes</td>
</tr>
<tr>
<td>Process Elapsed Time (Minutes)</td>
<td>22</td>
<td>Number of minutes the process has been running</td>
</tr>
<tr>
<td>Records per Minute</td>
<td>10.46</td>
<td>Number of records processed per minute</td>
</tr>
<tr>
<td>Number of Sub Processes</td>
<td>10</td>
<td>The number of sub processes launched from the parent process</td>
</tr>
<tr>
<td>Number of Records</td>
<td>100000</td>
<td>Number of records in the process</td>
</tr>
<tr>
<td>Number Not Processed</td>
<td>94452</td>
<td>Number of records not yet processed</td>
</tr>
<tr>
<td>Number Successful</td>
<td>5542</td>
<td>Number of records successfully processed</td>
</tr>
<tr>
<td>Number Failed</td>
<td>6</td>
<td>Number of records failed</td>
</tr>
<tr>
<td>Failure Rate</td>
<td>0.00006</td>
<td>Number of failures divided by the Number of Items</td>
</tr>
<tr>
<td>Assignment Elapsed Time</td>
<td>21.45</td>
<td>Number of minutes the assignment processing has been running</td>
</tr>
<tr>
<td>Records Processed Last 10 Minutes</td>
<td>12.63</td>
<td>Number of records processed in the previous 10 minutes</td>
</tr>
<tr>
<td>Number of Retries</td>
<td>0</td>
<td>Number of times the process has been resubmitted</td>
</tr>
</tbody>
</table>

You can also use the report to estimate the time it will take to complete a batch assignment process. This report provides details on the number of records completed and the number of records in progress. You can generate this report repeatedly to conduct performance analysis of the batch assignment processing.

**Batch Assignment Error Report: Explained**

You can use assignment management functionality to generate batch assignment error report. The batch assignment error report provides details of the error and warning messages generated while processing individual records during batch assignment process. The report provides a summary of the test input parameters and message details for each record that meets the input parameters. You can run this report while a batch assignment process (accounts, leads, opportunities, revenues, or partner accounts) is running, or after a process has completed.
Access the Diagnostic Dashboard to generate the batch assignment error report. The report shows the test parameters followed by two results tables. The first table provides a summary of the process, and the second table shows details of the records that meet the criteria entered when running the report.

Report Parameters

The following table describes the input parameters used to generate the batch assignment error report.

<table>
<thead>
<tr>
<th>Input Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent Process ID</td>
<td>Identifier for the parent ESS process. You can enter only a single process ID.</td>
</tr>
<tr>
<td>Assignment Status</td>
<td>Enter the status of the assignment, such as, error, succeeded, and so on. The default is error.</td>
</tr>
<tr>
<td>Work Object Public Unique Identifier</td>
<td>This is optional. The value that you enter here will depend on the Identifier Attribute of the work object being processed in a batch.</td>
</tr>
<tr>
<td>Range of Records</td>
<td>Enter the range of records in a process to report. The default value is the value set in the MOW_ DTF_ERROR_REPORT_MAX_LIMIT profile option. You can change this profile option value in the Manage Administrator Profile Values setup task.</td>
</tr>
</tbody>
</table>

Example Report

The following table shows an example of the Process Summary section of a batch assignment error report:

Process Summary

<table>
<thead>
<tr>
<th>Work Object</th>
<th>Candidate Object</th>
<th>Start Time</th>
<th>End Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>SalesAccount_Work_Object</td>
<td>SalesAccountTerritory_Candidate_Object</td>
<td>2013/2/11 12:13</td>
<td>2013/2/11 02:45</td>
</tr>
</tbody>
</table>

The following table shows an example of the Process Details section containing the records that meet the criteria entered when running the batch assignment error report:

<table>
<thead>
<tr>
<th>Work Object Public Unique Identifier</th>
<th>Assignment Status</th>
<th>Message Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1243213</td>
<td>Successful</td>
<td>Not applicable.</td>
</tr>
<tr>
<td>1728224</td>
<td>Error</td>
<td>225030 MOW_AMENG_AO_ASSERT_FAILED An error occurred while loading assignment object Sales_Account_Work_object. There is a mismatch between the view object definition in the assignment configuration and the actual view object definition used during assignment processing. Update and save the assignment object to register it with the latest view object definition.</td>
</tr>
</tbody>
</table>
Use the batch assignment error report to check if there were errors in the batch assignment process and if a particular work object record was processed.

### Running Lead Batch Assignment in Diagnostic Mode: Example

You can run your batch assignment in diagnostic mode to view the details of the assignment processing in an output log. This topic provides an example of running lead batch assignment in diagnostic mode.

#### Running Batch Assignment

A sales representative of a company has to follow up on a lead but the lead has not been assigned to his territory. He has requested you, the sales administrator, to investigate the details of territory assignment. You can provide these details by running lead batch assignment in diagnostic mode.

1. Sign in to the application and select **Navigator**, and then select the **Lead Qualification** menu item.
2. Select **Lead Processing Activities** on the **Tasks** pane.
3. On the Lead Processing Activity page, click the **Create Lead Processing Activity** button.
4. On the Create Lead Processing Activity page:
   a. Select **Assignment** from the **Process Type** list.
   b. Enable diagnostic mode by checking the **Diagnostic Mode** check box.
   c. Search and select a lead. Note down the lead number value to use in a later step.
   d. Select **Immediate** from the **Schedule** list.
   e. Click **Submit**.
5. On the Confirmation dialog box, click **OK**.

Two process are submitted, one for lead territory assignment and the other for lead rule-based (or resource) assignment. Note down the identifier of the territory or resource assignment processes you are interested in.

6. Click the Refresh icon till the process has completed successfully or with an error.
7. Select the appropriate territory or rule-based assignment process, and then click the Output log icon in the **View Log** column to view details.

Open the log file in another browser window or tab.

**Note:** The log file format is designed to be viewed in a browser application. If the log file is opened in another application, such as Notepad, the format may not be optimal and the log may be difficult to read.

View the log for details of the assignment processing for the selected lead. You can use the lead number noted down earlier to search in the log file. Review the log for details of the assignment processing.
Running Opportunity Batch Assignment in Diagnostic Mode: Example

You can run your batch assignment in diagnostic mode to view the details of the assignment processing in an output log. This topic provides an example of running opportunity batch assignment in diagnostic mode.

Running Batch Assignment

A sales representative of a company has to follow up on an opportunity, but the opportunity has not been assigned to his territory. He has requested that you, the sales administrator, investigate the details of territory assignment. You can provide these details by running opportunity batch assignment in diagnostic mode.

1. Sign in to the application, select Navigator, and then select Scheduled Processes.
2. Click Schedule New Process.
3. On the Schedule New Process page, click the Name drop-down list, and click Search.
4. On the Search and Select: Name dialog box, search for the Revenue Territory Territory Based Assignment process.
5. Select the Revenue Territory Territory Based Assignment process, and click OK.
6. On the Schedule New Process page, click OK.
7. On the Process Details page, enter the parameter values as shown in the following table:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Criteria Name</td>
<td>FilterByOptyNumber</td>
</tr>
<tr>
<td>View Criteria Bind Values</td>
<td>BindOptyNumber= XXX where XXX is the opportunity number</td>
</tr>
<tr>
<td>Diagnostic Mode</td>
<td>Select the check box.</td>
</tr>
</tbody>
</table>

8. Click Submit.
9. Note down the process ID.
10. Close the page and search for the process using the process ID.
11. Open the log file in another browser or tab.

Note: The log file format is designed to be viewed in a browser application. If the log file is opened in another application, such as Notepad, the format may not be optimal and the log may be difficult to read.

View the log file to review information on the assignment processing, the matching territories found, matching territories that were dropped because they were parent territories, and the final territories assigned.

Running Account Batch Assignment in Diagnostic Mode: Example

You can run your batch assignment in diagnostic mode to view the details of the assignment processing in an output log. This topic provides an example of running account batch assignment in diagnostic mode.
Running Batch Assignment

A sales representative of a company is due to meet with a new account he is now responsible for, but the account has not been assigned to his territory. He has requested that you, the sales administrator, investigate the details of territory assignment. You can provide these details by running account batch assignment in diagnostic mode.

1. Sign in to the application, select **Navigator**, and then select **Scheduled Processes**.
2. Click **Schedule New Process**.
3. On the Schedule New Process page, click the **Name** drop-down list, and click **Search**.
4. On the Search and Select: Name dialog box, search for the Request Account Assignments process.
5. Select the **Request Account Assignments** process, and click **OK**.
6. On the Schedule New Process page, click **OK**.
7. On the Process Details page, enter the parameter values as shown in the following table:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Object</td>
<td>SalesAccount_Works(Object</td>
</tr>
<tr>
<td>Candidate Object</td>
<td>SalesAccountTerritory_Candidate_Object</td>
</tr>
<tr>
<td>Assignment Mode</td>
<td>Territory</td>
</tr>
<tr>
<td>View Criteria Name</td>
<td>RegistryIDVC</td>
</tr>
<tr>
<td>View Criteria Bind Values</td>
<td>RegistryIDs= XXX where XXX is the party number (also known as registry ID)</td>
</tr>
<tr>
<td>Diagnostic Mode</td>
<td>Select the check box.</td>
</tr>
</tbody>
</table>

8. Click **Submit**.
9. Note down the process ID.
10. Close the page and search for the process using the process ID.
11. Open the log file in another browser or tab.

**Note:** The log file format is designed to be viewed in a browser application. If the log file is opened in another application, such as Notepad, the format may not be optimal and the log may be difficult to read.

View the log file to review information on the assignment processing, the matching territories found, matching territories that were dropped because they were parent territories, and the final territories assigned.

Running Partner Account Batch Assignment in Diagnostic Mode: Example

You can run your batch assignment in diagnostic mode to view the details of the assignment processing in an output log. This topic provides an example of running partner batch assignment in diagnostic mode.
Running Batch Assignment

A channel account manager of a company is due to meet with a partner account he is now responsible for, but the partner account has not been assigned to his territory. He has requested that you, the sales administrator, investigate the details of territory assignment. You can provide these details by running partner account batch assignment in diagnostic mode.

1. Sign in to the application, select Navigator, and then select Scheduled Processes.
2. Click Schedule New Process.
3. On the Schedule New Process page, click the Name drop-down list, and click Search.
4. On the Search and Select: Name dialog box, search for the Assign Territories to Partner Account process.
5. Select the Assign Territories to Partner Account process, and click OK.
6. On the Schedule New Process page, click OK.
7. On the Process Details page, enter the parameter values as shown in the following table:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Criteria Name</td>
<td>QueryByCompanyNumber</td>
</tr>
<tr>
<td>View Criteria Bind Values</td>
<td>BindCompanyNumber= XXX where XXX is the partner number</td>
</tr>
<tr>
<td>Diagnostic Mode</td>
<td>Select the check box.</td>
</tr>
</tbody>
</table>

8. Click Submit.
9. Note down the process ID.
10. Close the page and search for the process using the process ID.
11. Open the log file in another browser or tab.

> Note: The log file format is designed to be viewed in a browser application. If the log file is opened in another application, such as Notepad, the format may not be optimal and the log may be difficult to read.

View the log file to review information on the assignment processing, the matching territories found, matching territories that were dropped because they were parent territories, and the final territories assigned.

Batch Assignment Diagnostic Log: Explained

When you run batch assignment in diagnostic mode, an output log is generated with details of the assignment processing. You can use these details to troubleshoot any issues with territory assignment. The log helps you understand why certain leads or opportunities were not assigned to your territories as expected.

The following table provides an example of a lead batch assignment diagnostic run of territory-based assignment with rule filtering for a lead. It includes an explanation of each section of the log.

> Note: Use the search feature in your log file to search on keywords, such as the error message number, for example 225203, to locate a specific section.

<table>
<thead>
<tr>
<th>Example Log File Entries</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>The assignment processing is in diagnostic mode. Assignment results will</td>
<td>Provides a summary of the assignment processing and the number of work objects to be processed.</td>
</tr>
</tbody>
</table>
Example Log File Entries | Description
--- | ---
not be stored. The following number of work objects will be processed: 1. | You can change the number of work objects allowed to be processed in diagnostic mode through the MOW_DIAG_MODE_WO_LIMIT profile option. The default setting is 1.

The process 63034 started at time Wed, July 13 05:48:54 and is processing the following number of work objects: 1.

<table>
<thead>
<tr>
<th>Work Object</th>
<th>Candidate Object</th>
<th>Assignment Mode</th>
<th>View Criteria Name</th>
<th>View Criteria Bind Values</th>
<th>Rule Category Name</th>
<th>Replace Team</th>
<th>Maximum Sub Processes per Process</th>
<th>Metric Logging Interval</th>
<th>Test Data Parameters</th>
<th>Diagnostic Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead_Work_Object_Lead</td>
<td>Territory_Candidate_Object_Lead</td>
<td>Territory</td>
<td>LeadAssignmentDiagnosticVC</td>
<td>BindLeadNumberDiag= 108970</td>
<td>ORA_Sales_Lead_Territory_Rule_Category</td>
<td>true</td>
<td>10</td>
<td>0</td>
<td></td>
<td>true</td>
</tr>
</tbody>
</table>

Enables you to confirm the objects being processed in this batch, for example territories being assigned to leads, the type of assignment processing, and the other parameters and their values relevant for this batch process. Indicates the following:

- The process has started.
- Work object being processed and the candidates being found.
- Type of assignment processing:
  - Territory is territory assignment
  - Matching is assignment using rules
  - Score is scoring
  - Classification is ranking or qualification
- View criteria and bind value in leads which determine the set of leads that are included in this batch assignment process.
- Diagnostic mode setting.

Matching request for work object Lead_Work_Object_Lead with the identifier 108970 and candidate object Territory_Candidate_Object_Lead is in process. (MOW-225169)

<table>
<thead>
<tr>
<th>Geography Identifier</th>
<th>Customer Primary Address</th>
<th>Party ID</th>
<th>Lead Number</th>
<th>Customer ID</th>
<th>Industry Classification code</th>
<th>Organization Size</th>
<th>Organization Type</th>
<th>Geography Identifier</th>
<th>Custom Account Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>310 Park Ave SE Ste 2c5,OLYMPIA, WA 98504-0001</td>
<td>999997551079430</td>
<td>108970</td>
<td>999997551079430</td>
<td>2900</td>
<td>VERY_SMALL</td>
<td>null</td>
<td>15</td>
<td>null</td>
</tr>
</tbody>
</table>

Provides a summary of the active assignment attributes and their values that will be used in the processing of this lead.

Only a subset of these attributes may be used in the assignment processing of a lead, for example lead ranking rule may only use the score and time frame attributes.

- Values for the work object.
- Attributes that are null.
- Attributes that indicate the type of lead being processed. For example, Sales Account Indicator = Y

Use this information to confirm the data values for the work object that may be used in the assignment processing.
### Example Log File Entries

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account = A. C. Network (Olympia, US)</td>
</tr>
<tr>
<td>Sales Account Type = NAMED</td>
</tr>
<tr>
<td>Sales Channel = ZPM_ DIRECT_ CHANNEL_TYPES</td>
</tr>
<tr>
<td>OrgTp, Classification Code = A: PS-SL; T: PS-SL</td>
</tr>
<tr>
<td>Primary Partner Identifier = null</td>
</tr>
<tr>
<td>Acct, Customer ID = 999997551079430</td>
</tr>
<tr>
<td>Prospect Account Indicator = null</td>
</tr>
<tr>
<td>Sales Account Indicator = Y</td>
</tr>
<tr>
<td>Auxiliary Classification Code 2 = OFN1</td>
</tr>
<tr>
<td>Auxiliary Classification Code 3 = LANG-12113</td>
</tr>
<tr>
<td>Industry Classification Code = 2900</td>
</tr>
<tr>
<td>Auxiliary Classification Code 1 = CORPORATION</td>
</tr>
<tr>
<td>Named Sales Account = Y</td>
</tr>
<tr>
<td>Score = null</td>
</tr>
</tbody>
</table>

Assignment matching using mapping set Mapping Set 1 is in process. (MOW-225185)

Assignment mapping values were retrieved. (MOW-225211)

Function Code = Geo, Geography Identifier = 4, Customer Primary Address = 310 Park Ave SE Ste 2c5, OLYMPIA, WA 98504-0001

Function Code = CSize, Organization Size = VERY_SMALL

Function Code = AcTyp, Sales Account Type = NAMED

Function Code = Indst, Industry Classification Code = 2900

Function Code = Acct, Customer ID = 999997551079430

Function Code = OrgTp, Classification Code = A: PS-SL; T: PS-SL

Function Code = SChnl, Sales Channel = ZPM_ DIRECT_ CHANNEL_TYPES

Shows the active assignment mappings that drive territory-based assignment for this lead. Also shows the value for each mapping.

If an unexpected territory or set of territories has previously been assigned to the work object, then confirm that this is the information you expected to be used for this lead.
### Example Log File Entries

<table>
<thead>
<tr>
<th>Description</th>
<th>Example Log File Entries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment mapping values were translated to sequence values.</td>
<td>Assignment mapping values were translated to sequence values. (MOW-225212)</td>
</tr>
<tr>
<td>Function Code = CSize, Translated values = (7,7)</td>
<td></td>
</tr>
<tr>
<td>Function Code = Indst, Translated values = (26,26)</td>
<td></td>
</tr>
<tr>
<td>Function Code = SChnl, Translated values = (1,5)</td>
<td></td>
</tr>
<tr>
<td>Function Code = Acct, Translated values = (999997551079430)</td>
<td></td>
</tr>
<tr>
<td>Function Code = AcTyp, Translated values = (1,1)</td>
<td></td>
</tr>
<tr>
<td>Function Code = Geo, Translated values=(4, WA), (999984000001036, Pacific), (999984000001009, West), (1, United States), (999984000000008, North American Sales), (999984000000004), (ANY)</td>
<td></td>
</tr>
<tr>
<td>Function Code = Prod, Translated values = (1, 999999999999999)</td>
<td></td>
</tr>
<tr>
<td>Function Code = OrgTp, Translated values = (77,77)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>Example Log File Entries</th>
</tr>
</thead>
<tbody>
<tr>
<td>This section is relevant for Oracle Support to troubleshoot assignment issues.</td>
<td>This section is relevant for Oracle Support to troubleshoot assignment issues.</td>
</tr>
<tr>
<td>Candidate matches were identified. Post processing is in progress.</td>
<td>Candidate matches were identified. Post processing is in progress. (MOW-225210)</td>
</tr>
<tr>
<td>The territory with the attribute name Territory Number and attribute value 5377182 was deleted because it is a parent. (MOW-225209)</td>
<td>The territory with the attribute name Territory Number and attribute value 5377182 was deleted because it is a parent. (MOW-225209)</td>
</tr>
<tr>
<td>The territory with the attribute name Territory Number and attribute value 282312 was deleted because of an exclusion. (MOW-225208)</td>
<td>The territory with the attribute name Territory Number and attribute value 282312 was deleted because of an exclusion. (MOW-225208)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>Example Log File Entries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indicates that matching candidates were found and lists the matching candidates that were dropped since they are either parent candidates or part of excluded territories.</td>
<td>Indicates that matching candidates were found and lists the matching candidates that were dropped since they are either parent candidates or part of excluded territories.</td>
</tr>
<tr>
<td>If this lead was assigned previously and the territory you expected was not assigned, then review this list of dropped territories. The territory might have been dropped because it was a parent territory and a lower level territory under this also matched. Alternatively, this territory might have been excluded for this lead (for example, a partner might have rejected this lead) or the territory might have an exclusion coverage that contains the account on this lead.</td>
<td>If this lead was assigned previously and the territory you expected was not assigned, then review this list of dropped territories. The territory might have been dropped because it was a parent territory and a lower level territory under this also matched. Alternatively, this territory might have been excluded for this lead (for example, a partner might have rejected this lead) or the territory might have an exclusion coverage that contains the account on this lead.</td>
</tr>
<tr>
<td>The final matching candidates for mapping set Mapping Set 1 were identified. (MOW-225207)</td>
<td>The final matching candidates for mapping set Mapping Set 1 were identified. (MOW-225207)</td>
</tr>
<tr>
<td>Territory Number = 83,Territory ID = 1000000013157305</td>
<td>Territory Number = 83,Territory ID = 1000000013157305</td>
</tr>
<tr>
<td>Territory Number = 473,Territory ID = 1000000013157417</td>
<td>Territory Number = 473,Territory ID = 1000000013157417</td>
</tr>
<tr>
<td>Territory Number = 69095, Territory ID = 1001000051383477</td>
<td>Territory Number = 69095, Territory ID = 1001000051383477</td>
</tr>
<tr>
<td>Territory Number = 496,Territory ID = 3001000003212620</td>
<td>Territory Number = 496,Territory ID = 3001000003212620</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>Example Log File Entries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shows the final list of matching territories.</td>
<td>Shows the final list of matching territories.</td>
</tr>
<tr>
<td>Example Log File Entries</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Territory Number = 95, Territory ID = 300100003282208</td>
<td>Matching request for work object Lead_Work_Object_Lead with the identifier 142802 and candidate object Territory_Candidate_Object_Lead is in process. (MOW-225169)</td>
</tr>
<tr>
<td>Territory Number = 45, Territory ID = 300100004466888</td>
<td>Assignment processing using rule set RS12 is in progress. (MOW-225202)</td>
</tr>
<tr>
<td>Territory Number = 233, Territory ID = 300100004466906</td>
<td>Candidate matches were identified. Post processing is in progress. (MOW-225210)</td>
</tr>
<tr>
<td>Territory Number = 335</td>
<td>The final matching candidates for rule set RS12 were identified. (MOW-225201)</td>
</tr>
<tr>
<td>Territory Number = 274</td>
<td>The following number of candidates was returned for the matching request for work object Lead_Work_Object_Lead with the identifier 142802: 63. (MOW-225170)</td>
</tr>
<tr>
<td>Territory Number = 32</td>
<td>The assignment of following number of candidates to work object Lead_Work_Object_Lead with the identifier 142802 is in process: 63. (MOW-225167)</td>
</tr>
<tr>
<td>Territory Number = 335</td>
<td>The existing candidates were identified. (MOW-225200)</td>
</tr>
<tr>
<td>Territory Number = 274</td>
<td>If the lead was previously assigned, this section shows the existing territories as well as shows any territories that no longer match and therefore are going to be removed from the lead.</td>
</tr>
<tr>
<td>Territory Number = 32</td>
<td>If territory-based assignment with rule filtering was used, this section shows the rule set processing.</td>
</tr>
<tr>
<td>Territory Number = 220</td>
<td>Assignment disposition for work object Lead_Work_Object_Lead</td>
</tr>
<tr>
<td>Territory Number = 274</td>
<td></td>
</tr>
<tr>
<td>Territory Number = 32</td>
<td></td>
</tr>
</tbody>
</table>
Example Log File Entries | Description
--- | ---
with the identifier 142802 is complete. (MOW-225166) | Shows the leads post processing information, such as lead reassigned indicator is set to No, and that the last assigned date and time is set.

The lead assignment post processing has started.
The lead reassign value is set to N and assignment status is set to Assigned as part of lead assignment post processing.
The lead last assignment post processing date and time is set at 2016-08-11 06:31:09.0.
The lead assignment post processing has been completed.

Assignment matching using mapping set Mapping Set 2 is in process. (MOW-225185) | Shows the progress of assignment matching for a mapping set.
The mapping set Mapping Set 2 was skipped as the conditional attribute Primary Partner Identifier is blank. (MOW-225206)
Assignment matching using mapping set Mapping Set 3 is in process. (MOW-225185) | Shows the progress of assignment matching for a mapping set.
The mapping set Mapping Set 3 was skipped as the conditional attribute Prospect Account Indicator is blank. (MOW-225206)
Assignment matching using mapping set Mapping Set 4 is in process. (MOW-225185) | Shows the progress of assignment matching for a mapping set.
The mapping set Mapping Set 4 was skipped as the conditional attribute Custom Account Indicator is blank. (MOW-225206)
Assignment matching using mapping set Mapping Set 5 is in process. (MOW-225185) | Shows the progress of assignment matching for a mapping set.
The mapping set Mapping Set 5 was skipped as the conditional attribute SimplifiedLeadFlag is blank. (MOW-225206)
The total number of work objects processed: 1. Number of work objects successfully processed: 1. Number of work objects failed: 0. (MOW-225127) | Provides summary of how many work objects were successfully processed and how many failed.
Running Diagnostic Test for Territory Data Used by Assignment Manager: Procedure

You can use territory management to generate a report that shows the dimension and sequence details for territory dimensions defined for territories. Review the report to troubleshoot issues in territory assignment processing. This topic explains how to run and generate this report, and shows an example of the report.

Running and Generating the Diagnostic Test Report
To run diagnostic test for territory data used by assignment manager:

1. Sign in as an administrator who has access to territories.
2. Navigate to Territories.
3. Find the territories whose data you want to view and note down the territory numbers.
4. Click the Run Diagnostic Tests link from the Settings and Actions list.
5. On the Diagnostic Dashboard, search for Test for Data Used by Assignment Manager in the Test Name field.
6. Select the test and click Add to Run.
7. Click the Warning icon to enter the parameters.
8. On the Input Parameters dialog box, enter the parameters in the New Value field as shown in the following figure.

Note: If you are running the report for multiple territories, enter the territories without spaces. For example, CDRM_300,CDRM_123,CDRM_43. If you enter spaces, the report is run only on the first territory.
9. On the Choose Test to Run and Supply Inputs dialog, enter the Run Name and click Run.
10. On the Test Run Submitted dialog box, click OK.
11. On the Diagnostic Test run Status, click the Report icon on the relevant report row.
12. Review the report details.

For further assistance with troubleshooting, share the report with Oracle Support, along with the assignment diagnostic log files.

Purge Batch Assignment Information: Explained

Assignment management functionality enables implementations to purge data. When a batch assignment job runs, it creates data that helps with the assignment process. Once the job is completed, this data is no longer required and can be purged. The Enterprise Scheduling Service (ESS) process Purge Batch Assignment Information is used to purge the batch assignment tables based on set parameters. A batch assignment process creates data in two tables MOW_BATCH_ASGN_JOBS and MOW_BATCH_ASGN_JOB_ITEMS. When the size of the batch assignment process is huge, it creates a large number of rows in the MOW_BATCH_ASGN_JOB_ITEMS table. With time, records in these tables grow substantially, especially with large implementations. The purge batch assignment information process helps in clearing old records for successfully completed processes. The process purges data for batch assignment processes for leads, opportunities, accounts and so on.

Implementations may run this process periodically or on an ad-hoc basis. The process has only one parameter Days to Keep. The default value is 30.

Specify the number of days worth of assignment batch job and data to keep until the next purge. For example, if you set the parameter to 15, the process removes all rows related to successfully completed processes in the batch assignment data table that were created before 15 days from the current date.

Territory Dimension Data Report: Explained

The territory dimension data report identifies the volume of territory data for each territory dimension and coverage type. You can use information from this report to determine the sequence for each assignment mapping and optimize assignment performance. You must run this report only after you have created and activated your production territories.

Access the Diagnostic Dashboard to generate the territory dimension data report. The report shows the number of denormalized customer account-centric and partner-centric territory records for each territory dimension and coverage type. The function code field is used to specify a unique identifier for the attribute and where dimensional territory coverage is not defined, the report shows the counts for inherited customer and partner inclusions and exclusions manually defined.

The following table shows an example of a territory dimension data report:

<table>
<thead>
<tr>
<th>Function Code</th>
<th>Count for INCLUSION</th>
<th>Count for EXCLUSION</th>
<th>Count for PARTNER_REGULAR</th>
<th>Count for REGULAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>AcTyp</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>305</td>
</tr>
<tr>
<td>Acct</td>
<td>0</td>
<td>0</td>
<td>16</td>
<td>313</td>
</tr>
<tr>
<td>Aux1</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>385</td>
</tr>
<tr>
<td>Aux2</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>385</td>
</tr>
</tbody>
</table>
Once the report is generated, you must identify the sequence of mappings as follows:

1. Copy the report to a spreadsheet.
2. Sum up the count for inclusion, exclusion, partner_regular, and regular for each function code.
3. List the function codes in order from lowest total count to highest.

After you list function codes from lowest count to the highest, the report table should look like the following:
With this information, you can now update the sequence for each assignment mapping. The function code with the lowest total count, Geo in this example, should be updated to have the sequence 1. The next lowest total count, Prod in this example, should have sequence 2, and so on. You must update the sequence similarly for every mapping in each mapping set, for every work-object and candidate-object combination.
9 Setting Up Multiple Currencies

Setting Up Multiple Currencies: Overview

The applications support multiple currencies, multiple daily rates, and currency rate conversion. If you’re going to use multiple currencies, at a minimum you need to:

- Specify corporate currency: You may have already done this if you were following the currency setup in the Getting Started With Your Implementation guide. If you have already specified your corporate currency, you do not need to do so again.
- Specify the default currency: You may already have done this if you were following the currency setup in the getting started guide. If so, you do not need to do it again.
- Import or enter daily currency conversion rates.
- For opportunities integration, set the multi-currency profile option.
- Enable the currencies you are going to use, if you previously disabled them.

For more information, see the topic, Setting Up Multiple Currencies.

The applications also support different currency conversion rate types, allowing your business to maintain different conversion rates between currencies for the same period. Examples of conversion rate types are supplied: Spot, Corporate, User, and Fixed. For more information, see the guide, Oracle Financials Cloud Implementing Enterprise Structures and General Ledger.

Initial Tasks for Currencies

Setting Up Multiple Currencies

You must complete several steps to enable multiple currencies in the applications, as outlined in this topic.

The following are the high-level steps to enable multiple currencies. All of the steps shown in the table are covered in this topic.

<table>
<thead>
<tr>
<th>Step</th>
<th>Optional or Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Download the desktop integration installer.</td>
<td>Required</td>
<td>Download and run the installer that allows integration with the spreadsheet where you enter daily currency conversion rates.</td>
</tr>
<tr>
<td>Set corporate currency and rate type profile options.</td>
<td>Required</td>
<td>Set the two profile options that specify default corporate currency and rate type.</td>
</tr>
<tr>
<td>Define daily currency conversion rates.</td>
<td>Required</td>
<td>Populate and submit the spreadsheet with the daily currency conversion rates.</td>
</tr>
<tr>
<td>Set the multicurrency profile option for opportunities.</td>
<td>Optional</td>
<td>For opportunities, set the multicurrency profile option.</td>
</tr>
<tr>
<td>Step</td>
<td>Optional or Required</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>----------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Make the opportunity header currency an editable field.</td>
<td>Optional</td>
<td>For opportunities, make the opportunity header currency an editable field.</td>
</tr>
<tr>
<td>Ensure currencies are enabled.</td>
<td>Optional</td>
<td>Ensure that all of the currencies you plan to use are enabled for use.</td>
</tr>
<tr>
<td>Ensure setting of the environment profile option specifying default</td>
<td>Optional</td>
<td>Ensure that the profile option for default corporate currency in the</td>
</tr>
<tr>
<td>currency.</td>
<td></td>
<td>applications is set to the currency you want to be the default currency.</td>
</tr>
</tbody>
</table>

After you have enabled multiple currencies, sales users can set their preferred currency for the transactional pages and for business intelligence. For more information, see the related topic on currency preferences.

**Download the Desktop Integration Installer**

The Oracle Desktop Integration Installer enables integration of a Microsoft Excel spreadsheet into the web applications. Use the following steps to download the Desktop Integration Installer:

1. Sign in as a setup user and, in the Navigator, click the Download Desktop Integration Installer link in the Tools category.

   ![Note:](image)
   If that link does not work, then in the URL, replace after /homePage/ with /desktop_installer/

2. Save the executable (.exe) file to your computer.

   If Microsoft Project is not installed on your computer, an error may occur if you select Complete Install. To avoid this error, click OK and then select custom install, and then deselect Microsoft Project Integration.

**Set Default Currency Profile Options**

Use the following steps to set the profile options, Corporate Currency Default and Exchange Rate Type Default.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Company Profile
   - Task: Manage Currency Profile Options

2. On the Manage Currency Profile Options page, click ZCA_COMMON_CORPORATE_CURRENCY and set it to your default corporate currency. The display name for this profile option is Corporate Currency Default. It stores configured corporate currency.

3. Save your changes.

4. Click ZCA_COMMON_RATE_TYPE and set it to the default currency rate type. The display name for this profile option is Exchange Rate Type Default. It stores the default currency exchange rate type.
Define Daily Currency Conversion Rates

Use the following steps to define daily currency conversion rates.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Company Profile
   - Task: Manage Daily Rates

2. On the Currency Rates Manager page, click the Daily Rates tab.

3. Click Create in Spreadsheet and open the CreateDailyRates spreadsheet. In this spreadsheet, you define the start and end dates of your exchange rate (month, year).

4. Add some rows to the spreadsheet and enter your data. Enter a maximum of 10 rows at one time for a successful import.

**Note:** The CreateDailyRates spreadsheet does not actually have defined column heads in it. You enter data in columns A through H. Each row has a specific representation in the application when it creates the daily rates. Use the following example data as guidance:

   - Column A (this is the **From Currency** column): Enter the code for the currency to convert from. For example, enter **USD**.
   - Column B (this is the **To Currency** column): Enter the code for the currency to convert to. For example, enter **EUR**.
   - Column C (this is the **Conversion Rate Type** column): Enter the rate type used in the conversion. Enter **Corporate**.
   - Column D (this is the **From Conversion Date** column): Enter the start date of the conversion in the format, MM/DD/YY. For example, enter **12/31/2015**.
   - Column E (this is the **To Conversion Date** column): Enter the end date of the conversion in the format, MM/DD/YY. For example, enter **12/31/2016**.
   - Column F (this is the **Conversion Rate** column): Enter the currency conversion rate as a decimal. For example, enter **0.800300**.
   - Column G (this is the **Inverse Rate** column): Enter the currency inverse rate as a decimal. For example, enter **1.249400**.
   - Column H (this is the **Action** column): Enter the action. For example, enter **Insert**.

5. When you are done adding the data, click the **Submit** button in the spreadsheet.

   - After you submit the spreadsheet with the daily rate conversions, the application automatically runs the scheduled process, Import and Calculate Daily Rates. This process automatically calculates and enters inverse rates for you, so there is no need to enter these manually as separate rows. In other words, in the sample data used here, you do not need to enter two additional rows with From Currency as EUR, To Currency as USD, and opposite conversion and inverse rates.

   If successful, a confirmation message displays, saying that all rows were inserted successfully.

6. Optionally, to validate that the process ran successfully, navigate to the Scheduled Processes work area and search for the process, Import and Calculate Daily Rates. It should have a status of succeeded.

For more information about daily exchange rates and currency exchange rates types, see the applications help.
Enable Multiple Currencies in Opportunities

Some implementations may require different product lines on an opportunity to use different currencies. You can set up opportunities to use different currencies for the lines by setting the profile option, Multiple Currencies for Opportunity Revenue Lines Enabled.

After you set the profile option, you can use Oracle Page Composer to enable the Currency field as editable at the opportunity header level (see the following section, Make Opportunity Currency Field Editable). Note that with this setup, when a user changes the opportunity currency, the change is propagated to the opportunity product lines.

Use the following procedure to set the profile option to enable multiple currencies in opportunities.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Opportunity Profile Options

2. On the Manage Opportunity Profile Options page, search for the profile option, Multiple Currencies for Opportunity Revenue Lines Enabled (the code is MOO_REVN_ENABLE_MULTICURRENCY) and select it.

3. Set to Yes to allow different currencies at the line and header levels in opportunities. Set to No to disallow the functionality.

4. Save your changes.

⚠️ Caution: Do not use Oracle Application Composer to modify the Currency Code list of values for any objects. To modify currency codes, go to Setup and Maintenance and find the Manage Currencies task and related page.

Make Opportunity Currency Field Editable

By default, one currency is set for an opportunity and its product lines. This default currency is a user’s preferred currency (if set), or else the corporate currency, as specified in the profile option, Default Currency (FND_CURRENCY). In the opportunity edit page, the Currency list of values is read-only by default. If you have enabled multiple currencies, you can allow users to pick a different currency at the header level by making the Currency field editable using Page Composer. Use the following procedure. For more information about using configuration features, see the Extending Sales guide.

Prerequisites:

- At least one opportunity must be created first, because, in this procedure, you must navigate to an opportunity in Page Composer design view.
- You must be familiar with and follow your organization's guidelines for making changes using sandboxes.

1. Sign in as the sales administrator.

   ⚠️ Note: If you sign in as a setup user (or any user who is not part of the resource hierarchy), you will not be able to perform this procedure because you will not have access to opportunities.

2. Click your user name in the global header and select Manage Sandboxes. Create a new sandbox and activate it, or activate an existing sandbox.

3. Navigate to the opportunity landing page.

4. After activating the sandbox, go back to your user name in the global header and select Edit Pages.

5. In the Edit Pages dialog window, select a modification layer. For example, if the page or area supports it, you can make changes for just users with a specific job role. Select Site to have the changes available to all users in the environment. Click OK on the Edit Pages dialog window.
6. You return to the opportunity landing page. By default, you start in design view, which lets you navigate to the component you want to modify.

7. In design view, click any opportunity in the opportunity landing page.

8. With the Edit Opportunity page showing, in the background page, click the Select button. Clicking Select activates the ability to edit the page components.

9. Hover around the Currency field until a border appears around it, and click the mouse. Two options appear: Edit Component and Edit Parent Component. Click Edit Component.

The Component Properties: Currency dialog window appears.

10. In the Label area of the Component Properties: Currency dialog window, deselect the Read Only option and click OK. You return to the Edit Opportunity page. The Currency field should now appear with a list icon next to it.

11. Save your changes by clicking the Close button in the background window.

You return to the opportunity landing page.

12. Verify the change by clicking the name of the opportunity again and validating that the Currency field is a dropdown list that you select.

13. Cancel and return to the opportunity landing page.

14. Select your user name in the global header and select Manage Sandboxes. Publish the sandbox according to your established internal processes.

### Ensure Currencies are Enabled

By default, all currencies are enabled. Optionally, ensure the currencies you plan to use are enabled. Use the following steps:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Company Profile
   - Task: Manage Currencies

2. On the Manage Currencies page, click Search to search for all currencies, without entering any search criteria.

3. Ensure that the Enabled option is set for each currency you plan to use.

4. Save your work.

### Ensure Default Corporate Currency Profile Option Setting

The profile option Default Currency (FND_CURRENCY) specifies the default corporate currency for users in the transactional pages. The default currency is also used in a user’s forecast. By default, the profile option is set to US dollar. You can set this profile option at site level (affecting all users of the environment), at product level, or at user level. Users can set their own currency preference in the Personalization screens available in the user name menu. The setting a user sets for herself overrides the settings set in the profile option screens. Use the following procedure to ensure the default corporate currency is set for your environment.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values

2. On the Manage Administrator Profile Values page, search for and select the profile option name, Default Currency, or the code, FND_CURRENCY.

3. Ensure the profile option value is set to your environment’s default currency at site level.

To set the profile option for a specific product area or user, create a new row in the table and enter the values as needed.
Implementation Concepts for Currencies

Defining Currencies: Points to Consider

When creating or editing currencies, consider these points relevant to entering the currency code, date range, or symbol for the currency.

Currency Codes
You can’t change a currency code after you enable the currency, even if you later disable that currency.

Date Ranges
You can enter transactions denominated in the currency only for the dates within the specified range. If you don’t enter a start date, then the currency is valid immediately. If you don’t enter an end date, then the currency is valid indefinitely.

Symbols
Some applications support displaying currency symbols. You may enter the symbol associated with a currency so that it appears along with the amount.

Related Topics
- What’s the difference between precision, extended precision, and minimum accountable unit for a currency
- What’s a statistical unit currency type
- Euro Currency Derivation: Explained

Currency Precision Level for Quota Amounts: Explained

Currency amounts for quotas use the number of decimal places set in the Precision Level field for the corporate currency. If the precision level is not set, then amounts are saved and displayed with two decimal places.

You set the precision level for the currency in the Manage Currencies page. The currency you select for the profile option ZCA_COMMON_CORPORATE_CURRENCY, Corporate Currency Default, is the corporate currency.

Revalue Opportunity Currency Process: Explained

The Revalue Opportunity Currency process manages the effects of revaluation of currency exchange rates on opportunity revenue.

Opportunity revenue is stored in the user-entered currency (also called transaction currency) in the revenue model. The revenue model also stores two exchange rates:

- The exchange rate between the entered revenue currency and the configured corporate currency (as specified in the global configuration during the implementation), in order to facilitate construction of materialized views that roll up revenue metrics along the territory hierarchy.
• The exchange rate between entered revenue currency and the entered opportunity-level currency, in order to calculate the opportunity summary revenue amounts as the sum of line revenue amounts. Opportunity line revenue amounts can be entered in currencies that are different from the currency specified at the opportunity level.

The process works in combination with two CRM profile options that store corporate currency and rate type:

• Corporate Currency Default: Stores configured corporate currency.
• Exchange Rate Type Default: Stores configured rate type.

Also keep in mind the following behavior of the process:

• The process can also be triggered when corporate currency, configured rate type, or exchange rate (or any combination of these) is modified, either directly through administrator intervention or when these currency parameters change in the general ledger.
• Only product lines in Open status are targeted by the batch process.
• When updating product lines, the process does not consider whether the revenue is already included in a forecast.
• Forecasting activity is paused when this process executes.

Running the Process
Run the Revalue Opportunity Currency process from the job process screen available from the Scheduled Processes option on the Navigator menu. Select the job name Revalue Opportunity Currency.

The following are the steps to run the process in basic mode:

1. Sign in as a sales administrator or as a setup user.
2. From the Navigator, select Scheduled Processes (within the Tools category).
   The Scheduled Processes overview page appears.
3. Click Schedule New Process.
4. In the search dialog box, search for and select the Revalue Opportunity Currency process.
   The Process Details page appears.
5. Click Submit.

The following table shows the logical parameters expected by the batch process:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Default</th>
<th>Description</th>
</tr>
</thead>
</table>
| CRM Common Currency              | Stored in the profile option, Corporate Currency Default (ZCA_COMMON_CORPORATE_CURRENCY) | • Configured corporate currency.  
• Passed if corporate currency changes.  
• Program does not check against profile for match. |
| CRM Common Currency Rate Type    | Stored in the profile option, Exchange Rate Type Default (ZCA_COMMON_RATE_TYPE) | • Configured rate type.  
• Passed if there is a need to re-evaluate the conversion rate against a different rate type.  
• If no value is passed, program uses the profile option value. |
| Business Unit Organization ID    | No default                                   | Leave blank, and all business units will be targeted. Otherwise provide the specific business unit ID. |
## Parameter

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Default</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Opportunities per Database Update</td>
<td>500</td>
<td>Oracle recommends that you leave this parameter at the default value or blank (and program uses default value).</td>
</tr>
<tr>
<td>Last Batch Job Run Time Stamp</td>
<td>See Description column</td>
<td>This parameter can be used for batch program reruns. When a few opportunities have failed, the log will reflect all the failed opportunities, as well as provide a time stamp for “Start Batch Job Time Stamp”. Enter this time stamp on the second run of the batch program to limit the scope of the batch job to only the failed opportunities.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>System date</td>
<td>Date passed to general ledger (using an API) to calculate the conversion rate. The program does not validate that the date must be in the future, so, in effect, any date can be passed.</td>
</tr>
</tbody>
</table>

## Impact of Process on Revenue Attributes

The Revalue Opportunity Currency process impacts several revenue attributes, as shown in the following table.

<table>
<thead>
<tr>
<th>Revenue Model Attribute</th>
<th>Attribute Description/Function</th>
<th>Batch Process Update</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>CRM_CURRENCY_CODE and CRM_CONVERSION_RATE_TYPE are updated based on a parameter to the batch program. If these two parameters are passed in, the program uses them to update the revenue tables. If these values are not passed in, the application retrieves the profile option values and updates the revenue tables with them.</td>
</tr>
<tr>
<td>CRM_CURRENCY_CODE</td>
<td></td>
<td>CRM_CURRENCY_CODE is taken from the profile option, Corporate Currency Default (ZCA_COMMON_CORPORATE_CURRENCY).</td>
</tr>
<tr>
<td>CRM_CONVERSION_RATE_TYPE</td>
<td></td>
<td>CRM_CONVERSION_RATE_TYPE is taken from the profile option, Exchange Rate Type Default (ZCA_COMMON_RATE_TYPE).</td>
</tr>
<tr>
<td>CRM_CONVERSION_RATE</td>
<td></td>
<td>CRM_CONVERSION_RATE is calculated using a GL API.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CRM_CONVERSION_RATE_TYPE is updated based on a parameter to the batch program.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CONVERSION_RATE is updated. Changes if corporate rate types change. Rate is obtained.</td>
</tr>
</tbody>
</table>

### Notes

- The default for CRM_CURRENCY_CODE is taken from the profile option, Corporate Currency Default (ZCA_COMMON_CORPORATE_CURRENCY).
- The default for CRM_CONVERSION_RATE_TYPE is taken from the profile option, Exchange Rate Type Default (ZCA_COMMON_RATE_TYPE).
### Revenue Model Attribute

<table>
<thead>
<tr>
<th>Revenue Model Attribute</th>
<th>Attribute Description/Function</th>
<th>Batch Process Update</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>attributes are updated whenever the revenue is created or updated or whenever an opportunity with revenues is updated or saved.</td>
<td>using (conversion_rate_type, line_currency_code, summary_currency_code, and system date).</td>
</tr>
</tbody>
</table>
| REVN_AMT                | For summary revenue amounts, these amounts are calculated as the sum of line revenue amounts. These amounts are converted to the opportunity-level currency before calculating the sum. The exchange rate stored in the CONVERSION_RATE attribute is used to perform the conversion. | • Line revenue is not updated.  
• Summary revenue is recalculated. |
| DOWNSIDE_AMT            |                                             |                      |
| UPSIDE_AMT              |                                             |                      |

### Related Topics
- Setting Up Opportunity Revenue: Points to Consider

### Entering Daily Rates Using the Daily Rates Spreadsheet: Worked Example

You are required to enter the daily rates for currency conversion from Great Britain pounds sterling (GBP) to United States dollars (USD) for 5 days.

To load rates using the Create Daily Rates Spreadsheet, you must first install Oracle ADF Desktop Integration client software. Oracle ADF Desktop Integration is an Excel add-in that enables desktop integration with Microsoft Excel workbooks. You can download the installation files from the Tools work area by selecting Download Desktop Integration Installer.

#### Entering Daily Rates

1. From the General Accounting work area, select the Period Close link.
2. From the Tasks panel, click the Manage Currency Rates link.
   - Use the Currency Rates Manager page to create, edit, and review currency rate types, daily rates, and historical rates.
3. Click the Daily Rates tab.
   - Use the Daily Rates tab to review and enter currency rates.
4. Click the Create in Spreadsheet button.
   - Use the Create Daily Rates spreadsheet to enter daily rates in a template that you can save and reuse.
5. Click in the From Currency field. Select the GBP - Pound Sterling list item.
6. Click in the To Currency field. Select the USD - US Dollar list item.
7. Click in the Conversion Rate field. Select the Spot list item.
8. Click in the From Conversion Date field. Enter a valid value: 10/2/2017.
9. Click in the To Conversion Date field. Enter a valid value: 10/6/2017.
10. Click in the **Conversion Rate** field. Enter a valid value: 1.6.
11. Click **Submit** and click **OK** twice.
12. Review the **Record Status** column to verify that all rows were inserted successfully.
13. Save the template to use to enter daily rates frequently. You can save the spreadsheet to a local drive or a shared network drive.
14. Optionally, edit the rates from the Daily Rates user interface or resubmit the spreadsheet.

**Related Topics**
- Using Rate Types: Examples
- Using Desktop Integrated Excel Workbooks: Points to Consider

## Updating Currency Rates: Worked Example

You are required to change today's daily rates that were already entered. The rates you are changing are for currency conversion from Great Britain pounds sterling (GBP) to United States dollars (USD) for your company InFusion America. Currency conversion rates were entered by an automatic load to the Daily Rates table. They can also be entered through a spreadsheet.

### Updating Currency Rates

1. Navigate to the Period Close work area.
   - Use the Period Close work area to link to close processes and currency process.
2. Click the Manage Currency Rates link.
   - Use the Currency Rates Manager page to create, edit, and review currency rate types, daily rates, and historical rates.
3. Click the Daily Rates tab.
   - Use the Daily Rates tab to review and enter currency rates.
4. Click the From Currency list. Select the GBP - Pound Sterling list item.
5. Click the To Currency list. Select the USD - US Dollar list item.
6. Enter the dates for the daily rates that you are changing. Enter today's date.
7. Click the Rate Type list. Select the Spot list item.
8. Click the Search button.
9. Click in the Rate field. Enter the new rate of 1.7 in the Rate field.
10. Click in the Inverse Rate field. Enter the new inverse rate of 0.58822 in the Inverse Rate field.
11. Click the Save button.

**Related Topics**
- Using Desktop Integrated Excel Workbooks: Points to Consider
# 10 Setting Up Search

## Setting Up Search: Overview

The topics in this chapter help you maintain and optimize global search and work area search, the two principal ways of searching in the applications. The topics in this chapter cover:

- Turning on automatic alphabetic sorting of lists in the account, contact, and household work areas
- Periodically optimizing work area searches and modifying search behavior
- Activating global search on custom objects or deactivated objects
- Changing the behavior and appearance of automatic suggestions in global search

## Prerequisite Setups to Enable Search

You must complete the setup tasks outlined in the following table to enable the two searches. Detailed steps are provided in the Configuring Search chapter of the Getting Started with Your Sales Implementation guide.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Setup</th>
<th>Where to Get More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Schedule the following processes to run periodically:</td>
<td>You can schedule both process to run at the recommended intervals with the click of a button using the Schedule Work Area Search Process quick setup task for the Sales Foundation functional area. If you require different intervals, then you must separately schedule these processes from the Scheduled Processes work area.</td>
<td>See the Scheduling Work Area Search Processes topic in the Configuring Search chapter of the Getting Started with Your Sales Implementation guide.</td>
</tr>
<tr>
<td></td>
<td>- Synchronize CRM Search Indexes</td>
<td>Oracle recommends that you set this process, which builds the search index, to run every five minutes.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Optimize CRM Search Indexes</td>
<td>This process prevents index fragmentation and degradation in search performance. Oracle recommends that you run this process weekly.</td>
<td></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>Use the Manage Administrator Profile Values task in the Setup and Maintenance work area to set this profile.</td>
<td>See the Enabling the Global Search Profile Option topic in the Configuring Search chapter of the Getting Started with Your Sales Implementation guide.</td>
</tr>
<tr>
<td>3</td>
<td>Deactivate search on any application objects you do not use.</td>
<td>Use the Manage Search View Objects task in the Setup and Maintenance work area to deactivate the objects you do not use.</td>
<td>See Deactivating Search on Application Objects in the Configuring Search chapter of the Getting Started with Your Sales Implementation guide.</td>
</tr>
</tbody>
</table>

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.

**Related Topics**
- Getting Started with Your Sales Implementation guide

## Work Area Search

### Enabling Alphabetic Sort in Work Area Lists: Procedure

You can enable automatic alphabetic sort of the lists in the Account, Contact, and Household work areas by setting the system profile options listed in the following table to **Yes**. Because sort may affect application performance with large data sets, it is disabled by default.

<table>
<thead>
<tr>
<th>Profile Option Name</th>
<th>Profile Option Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sort Account Name</td>
<td>ZCA_LM_ACCOUNT_SORT</td>
</tr>
<tr>
<td>Sort Contact Name</td>
<td>ZCA_LM_CONTACT_SORT</td>
</tr>
<tr>
<td>Sort Household Name</td>
<td>ZCA_LM_HOUSEHOLD_SORT</td>
</tr>
</tbody>
</table>

**Setting the Profile Options**

To enable automatic alphabetic sort of the lists in the Account, Contact, and Household work areas, set the system profile option as follows:

1. Navigate to the Setup and Maintenance work area, and use the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values

2. Search for one of the profile options by name or by code.
   - The application displays the profile option information.

3. In the Profile Values section, select **Yes** from the **Profile Value** list.

4. Click **Save and Close**.
Scheduling Search Processes

You can set up the search indexing and search optimization processes to run at the recommended intervals with the click of one button by using the Schedule Work Area Search Processes quick setup task. (See the Configuring Search chapter of the Getting Started with Your Sales Implementation guide for details.) To run the indexing or search optimization processes at intervals that are different from the recommended intervals, do the following:

1. Sign in as a setup user.
2. In the Navigator, click Scheduled Processes under the Tools heading.

   The Schedule Processes window appears.
3. Click Schedule New Process.

   The Schedule New Process window appears.
4. Make sure the Job option is selected.
5. Enter the name of the process (Optimize CRM Search Indexes or Synchronize CRM Search Indexes) in the Name field and click OK.

   The Process Details window appears.
6. Click Advanced.
7. On the Schedule tab, select the Using a schedule option.
8. Select a frequency.
9. Enter an end date in the far future.
10. Click Submit.

Modifying Work Area Search Behavior

You can modify the work area search behavior by setting the profile options listed in the following table.

<table>
<thead>
<tr>
<th>Profile Option Code</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZCA_MIN_SEARCH_CHARACTER</td>
<td>Sets the minimum number of characters required for searching in the work area searches. If your data volume is low, you can decrease the minimum number of characters required for search to one. If performance is an issue, you can improve search performance by increasing the minimum number of characters required for search to three.</td>
<td>2</td>
</tr>
<tr>
<td>ZCA_MAXNUMBER_OF_SUGGESTIONS_TO_SHOW</td>
<td>Controls the number of suggestions that are displayed in the autosuggest window in both global search and work area search.</td>
<td>15</td>
</tr>
<tr>
<td>ZCA_LMFIND_USE_STARTSWITH</td>
<td>Setting this profile to Yes substitutes the Starts With operator for searches in the work areas. This setting requires users to enter the</td>
<td>N</td>
</tr>
</tbody>
</table>
### Setting the Profile Options

To set the system profile options, do the following:

1. Navigate to the Setup and Maintenance work area, and use the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values

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

3. Click **Search**.

   The application displays the profile option information.

4. Make your changes.

5. Click **Save and Close**.

### Changing Record Set Values: Procedure

You can change the values that appear in the **Record Set** field list. Each record set value restricts a search to a subset of records. If a value does not apply to your implementation, for example, then you can remove the value from the list by entering an end-date. If you do not use sales teams or sales territories, then you can remove all of the values that restrict the search by sales team or by territory.
Changing Record Set Lookup Values

1. Navigate to the Setup and Maintenance work area, and use the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Standard Lookups

2. In the Meaning field, enter %Record Set%.
3. Click Search.

The page displays a list of the lookup types for search filter record sets for the different sales objects. Here's a screenshot of the Manage Standard Lookups page showing some of the search results.

4. Select the lookup type you want to change in the search results.
5. You can edit the values in the Lookup Codes region. You must scroll down.
Here’s a screenshot of the Lookup Codes region of the Manage Standard Lookups page for the Lead Search Filter Record Sets lookup type.

You can perform one or more of the following edits, depending on the lookup type:

- Change the wording the user sees in the list by editing the **Meaning** field. Changing the meaning does not affect application functionality.
- Remove a value from use by entering an end-date.
- Change the display sequence.

6. Click **Save and Close**.

**Disabling Rolling-Time Operators for Searches: Procedure**

You can use rolling-time operators, such as today, this week, and this month, as filters in work area searches. Searching for all the opportunities created this month, for example, returns all of the opportunities created in the current calendar month. The rolling-time operators use the time zone of the signed-in user for the calculation. You can disable any of the operators by editing the lookup type `ORA_ZCA_ROLLING_TIME` (Rolling Time Values for Work Area Searches).

The predefined rolling-time operators include:

- Yesterday
- Today
- Tomorrow
- Last Week
- This Week
- Next Week
- Last Month
- This Month
Use the following steps to disable any of the values:

1. Navigate to the Setup and Maintenance work area, and use the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Standard Lookups
2. In the Lookup Type field, enter `ORA_ZCA_ROLLING_TIME`.
3. Click Search.
4. You can disable any of the rolling-time values, by enter an end date or deselecting the Enabled option.
5. Save your changes.

Disabling the Display of Search Results with Similar Spellings: Procedure

By default the application displays records with similar spellings in the different work area search results. For example, if you are searching for accounts using the word `software`, then the application first displays the account names that contain that word, such as Compucon Software and Forte Software Inc, followed by names with similar spellings, such as Softgear Inc. You can disable the display of results with similar spellings in work area searches by setting the system profile option Include Similar Results in Searches to No.

Note: The application displays similar spellings in search results only if you are using the default contains search operator. If you set the system profile option Use Starts With Operator (`ZCA_LM_FIND_USE_STARTSWITH`) to Yes, then similar spellings are never shown in search results regardless of the setting of the system profile option Include Similar Results in Searches.

To disable the display of similar spellings in search results, do the following:

1. Navigate to the Setup and Maintenance work area, and use the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values
2. In the Search: Profile Option region, Profile Display Name field, enter `Include Similar Results in Searches`.
3. Click Search.
   The application displays the profile option information.
4. In the `ZCA_LM_FUZZY_SEARCH`: Profile Values section, select No from the Profile Value list.
5. Click Save and Close.

Enabling Additional Search Operators for Text and List Field Searches: Procedure

You can enable additional operators (Is Blank, Is Not Blank, and Does Not Equal,) for searches in text fields and fields validated by lists of values. For example, selecting the Is Blank operator, makes it possible for salespeople to search for
records missing values. These operators are not available by default because their use can affect search performance. You can make these operators available on mandatory standard and custom fields, by setting one or both of the following two system profile options to Yes:

- Enable Additional Search Operators for Text Fields (ZCA_ENABLE_ADDITIONAL_TEXT_OPERATORS) enables the Is Blank and Is Not Blank operators in text field searches.
- Enable Additional Search Operators for List of Values (ZCA_ENABLE_ADDITIONAL_LOV_OPERATORS) enables the Is Blank, Is Not Blank, and Does Not Equal operators in fields validated by lists of values (both fixed choice and dynamic choice list fields).

To display the additional operators:

1. Navigate to the Setup and Maintenance work area, and use the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values
2. In the Search: Profile Option region, Profile Display Name field, enter Enable Additional Search Operators%.
3. Click Search.
   - The application displays information for the two system profile options.
4. Select the name of the system profile option you want to enable.
5. In the Profile Values section, select Yes from the Profile Value list.
6. Click Save and Close.

Configuring Resource Search: Explained

Sales users can use extensible resource picker to search and associate users to business objects relevant to their business flows. Users can search using custom fields and view custom fields in the search results, which allows them to find and choose the right resource records.

An administrator can create dynamic role-based picker layouts, show or hide standard fields for search as well as result sections within a picker, re-arrange fields in the search and result sections, define default values for search fields, and mark certain fields as required or read-only based on the business need.

An administrator can also configure custom dynamic choice lists (DCL) for the resource object similar to the out of the box pickers.

Configuring Resource Search: Procedure

You can configure resource search, enabling users to search and associate a resource as an owner or a team member to a business object, such as account, contact and opportunity.

Setting up the resource search involves:

- Creating a dynamic page layout for the resource object
- Configuring the resource picker
Creating a Dynamic Page Layout for the Resource Object

To create a dynamic page layout for the resource object:

1. Ensure that you are working on an active sandbox.
2. Navigate to Application Composer.
3. Under the Objects navigation tree, expand the tree structure for the Resource object.
4. Click the Pages node.
5. Select the Simplified Pages tab.
6. In the Search and Select Dialog Layouts region, create a custom layout.
7. Click the link for the custom layout name you created and set up the fields.
   - To set up the fields in the search region:
     i. Click the edit icon next to Search Region.
     ii. In the Configure Search Region area, select the fields that should appear in the search region. Optionally, you can set the default operator for the fields in the search region and set the fields as required.
     iii. Click Save and Close.
   - To set up the fields in the search results:
     i. Click the edit icon next to Search Results.
     ii. In the Configure Detail Form area, select the fields that should appear in the search results.
     iii. Click Save and Close.

Configuring the Resource Picker

To configure the resource picker:

1. Ensure that you are working on an active sandbox.
2. Navigate to Application Composer.
3. Under the Objects navigation tree, expand the tree structure for the required object, such as Account.
4. Click the Pages node.
5. Select the Simplified Pages tab.
6. In the Details Page Layouts region, navigate to the link for your custom layout if it already exists, otherwise create a new custom layout.
7. Click the link for the custom layout name.
8. In the Subtabs Region, click the required subtab, such as Profile, and click the edit icon next to Summary.
9. In the Configure Detail Form region, click the edit icon next to the Owner field or any custom DCL field you have added.
10. Based on your requirement, you can set the default value for the fields. You can also set the fields as read only.
11. Click OK.
12. Click Save and Close.

Global Search
Activating Global Search on Objects You Created or Deactivated: Procedures

Oracle activates global search on all application objects where search is available. Use this procedure to activate search on any objects you deactivated in the past or for objects you created. You can activate search only on the objects you created, not on their child objects.

To make an application object available for global search, you must do the following:

1. Activate the object.
2. Specify the frequency with which the object will be indexed.
3. Optionally, you can modify the list and order of fields indexed in the search and displayed in the search results.

Activating an Object for Search

To activate an object for search, do the following:

1. Navigate to the Setup and Maintenance work area, and use the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Search View Objects
2. Select the object you want to enable for search.
3. Click **Activate**. The status for the object changes to **Active**.

   **Tip:** Make sure you deactivate any object that is not needed for global search to maximize system resources.

Setting the Indexing Frequency and Schedule

After you have activated the object, you must specify how frequently you want the object records indexed.

Oracle recommends that you index objects daily during off-hours. You should stagger the indexing times for the different objects to minimize performance impacts.

Specifying the fields to be indexed and displayed in the search results is optional because these are already set up for you.

1. Select the **Display Name** link of the object.
   
   The Edit Search View Object page appears.

2. In the Index Schedule region, select the **Frequency Type** and enter the number of days between index runs and the time, if appropriate. Oracle recommends staggering the indexing schedule to maximize available system resources.

3. You can change which fields the application indexes and which fields display in search results as described in the Specifying Which Fields Are Indexed and Displayed in Search Results section.

4. When you are done, click **Save and Close**
   
   The application returns you to the Manage Search View Objects page where you can monitor the status of the index generation for each object.
The first time your scheduled indexing process runs or any time you modify the list of fields in the object, the application generates a complete index of all the existing records. Subsequently, the process indexes only records that have changed.

If you end up with many inactive records in your system over time, you can improve the efficiency of your searches by periodically regenerating the full index. This can be accomplished by selecting the object and clicking Full Reindex.

**Specifying Which Fields Are Indexed and Displayed in Search Results**

In the Edit Search View Object page, you can also change which fields the application indexes and which fields display in search results. You must index the fields you created if you want them to be available for searches.

- The **Title** and **Fixed Content** fields let you specify which fields are displayed in search results and in what order.
  - **Title** is the linked heading of each search result.
  - **Fixed Content** is the text which appears under the heading.

  For example, the titles starting with the word **Opportunity** are links which permit users to drill down to the record. The rest of the fields are the fixed content.

- The **Body** field lists the fields that are indexed by the application. The most relevant fields are displayed in the search results, space permitting. While the **Body** field includes all of the standard fields for indexing, you must add the fields you created to the list if you want them available for searches.

To make changes, click **Edit** (the pencil icon) and make your changes in the Edit Search View Object window.

**Related Topics**

- Enabling the Global Search Profile Option

**Setting Global Search Configurations as Enabled or Default: Examples**

Each global search configuration contains settings for the global search, and a configuration can apply to specific pages or applications. Use the Manage Global Search Configurations page to enable or disable configurations, and select the one to use as the default. The following scenarios explain which configurations actually apply to the global search, depending on the configurations that you enable or set as default.

**Predefined Default**

The predefined Default configuration is always enabled and set as a default. This configuration is the working default unless a custom global search configuration is also set as a default. In this scenario, you don't enable any other configuration, so this Default configuration applies to the global search on all pages, in all applications.

**Custom Default**

You create a global search configuration that applies to page A and application B. Later, you set your configuration as the default. Only this configuration and the predefined Default configuration are enabled. Both are set as default.

The result is that:

- Your configuration overrides the predefined Default one and becomes the working default.
Even though you defined your configuration to apply to page A and application B, it now actually applies to all pages and all applications. This is because your configuration is the working default, and no other configuration is enabled.

Specific Pages or Applications
You’re using either the predefined Default configuration or a custom configuration as the default. You also enable:

- **Configuration 1**: Applies to application A
- **Configuration 2**: Applies to application B and a few pages in application A

The result is that:

- Configuration 1 applies to all pages in application A, except the few pages that use configuration 2.
- Configuration 2 applies to all pages in application B, plus the few pages in application A.
- The default configuration applies to all other applications and pages.

Creating Global Search Configurations: Procedure
Predefined global search configurations control how the global search behaves and looks. You can’t edit these configurations, but you can duplicate them and edit the copies, or create your own from scratch.

Creating a Configuration
Follow these steps:

1. Click **Navigator > Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to the following:
   - Functional Area: Application Extensions
   - Task: Manage Applications Core Global Search Configurations
3. On the Manage Applications Core Global Search Configurations page, click the **Create** icon, or select a row and click the **Duplicate** icon.
   - **Note**: You can’t delete a configuration after you create it, but you can disable it.
4. For the short name (identifier for your configuration), enter an alphanumeric code with uppercase letters and no spaces.
5. Enter a user-friendly name and description for the configuration.
6. Select the **Default** check box to use your configuration as the default instead of the predefined Default configuration. If another custom configuration was already set as the default, then your configuration becomes the new custom default.
7. Select a product family if the configuration is for applications or pages within a specific family. Otherwise, select **Common**.
8. If you’re creating a duplicate, click **Save and Close**. To go on to the next steps and define more settings, select your configuration and click **Edit**.
9. Enter a module within the product family you selected. If you selected the Common family, then select the **Oracle Middleware Extensions for Applications** module.
10. Use the tabs to define your configuration:
   - **Autosuggest**: Determine what’s available to users in the global search autosuggest, as well as how the autosuggest looks and behaves.
Setting Up Search

- **Search Field**: Control the Search field in the global header and in the search results dialog box.
- **Search Results**: Enable or disable saved and recent searches, select the search categories available to users, and define settings for filters.
- **Pages**: Indicate the applications or pages that this global search configuration applies to.

11. Save your work.

Related Topics
- Modules in Application Taxonomy: Explained

Setting Up the Autosuggest for the Global Search: Procedure

Use global search configurations to determine what’s available to users in the autosuggest. You select the suggestion groups to include in configurations. The configurations also determine how the autosuggest looks and behaves.

**Prerequisite**

Create a global search configuration or edit an existing one. Follow these steps:

1. In the Setup and Maintenance work area, go to the following:
   - Functional Area: Application Extensions
   - Task: Manage Applications Core Global Search Configurations

2. On the Manage Applications Core Global Search Configurations page, click the **Create** icon to create a global search configuration, or select an existing row and click the **Edit** icon to change it.

**Defining the Content**

To define synonyms, select suggestion groups and determine how they’re displayed in the autosuggest:

1. On the page to create or edit global search configuration, click the Autosuggest tab.
2. In the Synonyms section on the Autosuggest tab, select **Enable Synonyms** to let users search using synonyms.
3. Optionally, enter the following:
   - **Synonym Context Code**: A logical grouping such as a product family, navigation group, or work area that determines the subset of synonyms to search on. For example, if you enter Academics, every time the user enters a term and clicks the **Search** icon, the search runs on all terms related to Academics and their synonyms.
   - **Synonym Object Type**: A business object name that would determine the subset of synonyms to search on. For example, if you enter Curriculum, every time the user enters a term and clicks the **Search** icon, the search runs on all terms related to Curriculum and their synonyms.

4. Click **Manage Synonyms**.

5. To add search terms and create synonyms for them, on the Manage Synonyms page:
   a. Click the **New** icon and do the following:
      - Enter a short name in uppercase, with no spaces. This name is required as an identifier.
      - Select a module name, which is required to map the data with a specific product or area. There are no restrictions on where the synonyms can be used.
      - Optionally, enter a context code and object type. This information can be used to ensure that certain synonyms are only used when a global search configuration having the same values is in effect.
Chapter 10
Setting Up Search

- Enter the primary synonym, which is the main term or business object to which other synonyms are to be matched.
- Enter at least one synonym that matches the primary synonym.

b. Click Save and Close.

6. Select the Enable personalization of search groups check box to allow users to override your configuration. Users can hide, show, and reorder suggestion groups for their autosuggest.

7. In the Suggestion Group section on the Autosuggest tab, move the groups you want to include into the Selected Groups pane. Use the Move, Move All, Remove, and Remove All icons to move the groups.

The Enabled column in the Available Groups pane indicates if the group is defined (on the Manage Suggestion Groups page) to be displayed by default or not in the autosuggest.

8. In the Enabled column in the Selected Groups pane, select one of the following values:

   - Inherit: In the autosuggest, the group is displayed or hidden by default depending on what’s defined for the group.
   - Yes: The group is displayed by default, no matter what’s defined for the group.
   - No: The group is hidden by default, no matter what’s defined for the group.

   Note: The Displayed by Default column shows the resulting behavior in the autosuggest, based on what you select in the Enabled column.

9. Using the Move to Top, Move Up, Move Down, and Move to Bottom icons, order the selected groups as you want them to appear in the autosuggest.

   Tip: Click Manage Suggestion Groups at any time to edit or create suggestion groups. When you return to the Autosuggest tab, click Refresh to reflect the changes you made to suggestion groups.

Defining the Appearance

Optionally define settings in the Appearance section on the Autosuggest tab:

- Show Suggestion Group Headings: Select this option to display suggestion group headings (text and icon) in the autosuggest. Even if you do so, if a group is defined on the Manage Suggestion Groups page to not show headings, then its heading won’t be displayed.

- Show Icons: Select this option to display icons next to suggestions in the autosuggest.

- No Suggestions Message: Enter the message that appears when no suggestions match the user’s search term. If you leave this field blank, then no autosuggest or anything at all appears when there are no matches.

Defining the Behavior

Optionally define settings in the Behavior section on the Autosuggest tab:

- Show Top Suggestions: Enable this option to display suggestions in the autosuggest as soon as the user clicks in the search field, even without entering a search term. For example, the last few pages the user opened would appear as suggestions in the Recent Items group.

- Minimum Characters for Autosuggest: Enter the number of characters that users must enter in the search field before matching suggestions appear in the autosuggest.

- Maximum Number of Suggestions: Enter the maximum number of suggestions to be displayed across all suggestion groups. This total is distributed as equally as possible among the groups.
Disabling Saved Searches and Recent Searches for the Global Search: Points to Consider

Global search configurations determine if saved searches and recent searches are enabled in the global search. Consider the following points when you use disable either. In the Create or Edit Global Search Configuration page, open the Search Results tab and use the Saved and Recent Searches section.

Disabling Saved Searches
If you disable saved searches:
- You disable the Save button in the search results dialog box, so users can’t create or edit saved searches for global search.
- You’re not disabling the Saved Searches suggestion group. Users can still see any applicable saved searches in the global search autosuggest.

Disabling Recent Searches
If you disable recent searches:
- The application isn’t saving recent searches.
- You’re not disabling the Recent Searches suggestion group. Users can still see in the autosuggest any applicable searches that they recently ran before you disabled recent searches.

Setting Up Filters for the Global Search: Procedure

To determine how users can filter their search results, define the appropriate settings when you create or edit global search configurations. You can set up search categories so that users can limit the scope of their search to begin with, or refine their search results.

Prerequisite
Create a global search configuration or edit an existing one. Follow these steps:

1. In the Setup and Maintenance work area, go to the following:
   - Functional Area: Application Extensions
   - Task: Manage Applications Core Global Search Configurations
2. Click the Create icon to create a global search configuration, or select an existing one and click the Edit icon to change it.

Setting Up Categories to Narrow Search Scope
To let users select the categories to search on before running the search:

1. On the page to create or edit global search configuration, click the Search Results tab.
2. In the Saved and Recent Searches section, select the check boxes to enable saved searches and recent searches.
3. In the Filters section, enable personalization of search categories.
4. In the Search Categories section, select the categories that users can search on. If you don’t select any, then every category is available to users.
Setting Up Categories as Search Result Filters

To let users filter search results based on category:

1. In the Filters section, select a filter display style so that the list of all available category names are displayed:
   - **Inline**: In the Filters pane in the search results
   - **LOV**: In a Categories dialog box that users can open from the Filters pane

2. Select the check boxes to show subcategories, facets, or both. Categories are always displayed. Subcategories are an additional level of filters that appear after categories, and facets are a level after categories.

3. In the Search Categories section, select the categories to use as filters. This is the same set of categories to be used for personalization. If you don’t select any, then every category is available to users.

Setting Other Options for Filters

You can also use the Filters section to:

- **Show hit counts**: Show the number of search results that match each filter value
- **Enable clear all filters**: Allow users to clear all filters with one click of a button
- **Show applied filters**: Show all the filters that have been applied

In the Last Updated Date Filters section, select the criteria to use as filters, based on the last update date. If you don’t select any, then every date filter is available to users.

In the Appearance section, set the **Show Icons** option **Off** if you don’t want to display the icons.

Specifying the Pages or Applications That a Global Search Configuration Applies To: Procedure

As part of defining your global search configuration, you can specify the pages or applications (or both) that your configuration applies to. If you want your configuration to apply to all pages in all applications, then skip these steps.

Prerequisites

If you want the global search configuration to apply to specific applications, you need to find the application short name.

1. Click **Navigator > Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to the following:
   - Functional Area: Application Extensions
   - Task: Manage Taxonomy Hierarchy
3. On the Manage Taxonomy Hierarchy page, expand the Oracle Fusion node.
4. Select the row (with the Application module type) for your application, and click **Edit Module**.
5. In the Application Details section, see the **Application Short Name** column and note down the value to use as the application short name.

Adding Pages or Applications

Follow these steps:

1. On the Create or Edit Global Search Configurations page, open the Pages tab.
2. Click the **Create** icon.
3. In the **View Type** column, indicate if the configuration applies to a specific page or application.

4. Enter a view ID to identify the page or application:

   - **Tip:** You can use % as a wildcard for the page or application value, such as *Example%* for all pages that start with *Example*.
   - **Page:** Enter the last part of the URL you get when you open that page. For example, enter *ExamplePage* from the URL [http://exampleServer/homePage/faces/ExamplePage](http://exampleServer/homePage/faces/ExamplePage).
   - **Application:** Enter the application short name with a wildcard at the end, for example *HomePageApp%*.

5. Add more pages or applications as needed.

### Related Topics
- [Modules in Application Taxonomy: Explained](#)

### Managing Alternate Words for Global Search: Points to Consider

Use the Manage Applications Core Alternate Words task in the Setup and Maintenance work area to maintain a list of search terms that users might use for the global search. For each user keyword, define a possible alternate to also search on. Consider various reasons for defining these word pairs, and also decide whether to automatically search on both terms or not.

#### Reasons for Word Pairs

This table provides some reasons and examples for managing alternate words.

<table>
<thead>
<tr>
<th>Purpose</th>
<th>What You Enter</th>
<th>User Input Keyword Example</th>
<th>Alternate Keyword Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Correct user typos</td>
<td>A possible typo as the user input keyword, and the correctly spelled term as the alternate keyword</td>
<td>Oracel</td>
<td>Oracle</td>
</tr>
<tr>
<td>Account for abbreviations and acronyms</td>
<td>An abbreviation or acronym and what it stands for</td>
<td>BI</td>
<td>business intelligence</td>
</tr>
<tr>
<td>Account for common variations in spelling</td>
<td>Two different ways to spell the same term</td>
<td>email</td>
<td>e-mail</td>
</tr>
<tr>
<td>Enable matches on synonyms</td>
<td>A pair of terms that are functionally similar</td>
<td>hyperlink</td>
<td>link</td>
</tr>
<tr>
<td>Help new users who are not familiar with what things are called in the application</td>
<td>The term that your users might search on as the user input keyword, and the equivalent in the application as the alternate keyword</td>
<td>concurrent program</td>
<td>scheduled process</td>
</tr>
</tbody>
</table>

---

**Note:** You don’t have to account for plurals or case sensitivity. For example, if you have *email* as a user input word, you don’t have to also add *Email* or *emails* as an input word.
Automatically Search Both Terms
For each pair of terms, use the Automatically Search Both check box to determine what happens when the user enters the input word and starts the search:

- **Yes:** The search runs and displays results based on both terms.
  
  Before you select this check box, carefully consider possible impact. For example, would users get a lot of unnecessary search results, making it harder to find what they want?

- **No:** The user sees a message and can decide to continue searching on just the input term, or to search on just the alternate term instead.

Global Search Automatic Suggestions

Suggestion Groups for the Global Search: Explained
A suggestion group is a category of suggestions that users see in the autosuggest for the global search. For example, if the user enters Report in the Search field, then the Navigator suggestion group in the autosuggest shows any Navigator menu names with Report.

Managing Suggestion Groups
Each suggestion group can have a heading, for example Recent Items, as well as an icon that appears before the heading text. The icon helps users identify what the group is all about.

You can manage suggestion groups to:

- Show or hide the group by default in the autosuggest
- Enter the heading text
- Define if the heading text appears in the autosuggest or not
- Identify the image file to use as the icon

Tip: You can copy predefined suggestion groups and edit them to create your own versions.

To manage suggestion groups, open the Setup and Maintenance work area and use either the:

- Manage Suggestion Groups task
- Autosuggest tab when you create or edit global search configurations using the Manage Global Search Configurations task

Using in Global Search Configurations
Just because a suggestion group is defined to be displayed by default doesn’t necessarily mean that it in fact appears in the autosuggest. Global search configurations determine which groups are included for the autosuggest, whether icons appear for the headings, and so on.

You can use a suggestion group in many or all global search configurations. And ultimately, if personalizing suggestion groups is enabled, then users can show, hide, and reorder the suggestion groups included in the global search configuration.
Changing the Heading Text and Icon for Suggestion Groups: Worked Example

This example shows how to change the icon and text for a suggestion group heading in the global search autosuggest. In this example, you start out with the predefined Default global search configuration enabled, and no custom configurations.

The following table summarizes key decisions for this scenario.

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Which predefined suggestion group do you want to change?</td>
<td>Recent Items</td>
</tr>
<tr>
<td>What do you want the new heading text to be?</td>
<td>Recently Visited Pages</td>
</tr>
<tr>
<td>Which image do you want to use as the icon?</td>
<td>A .png file (16 by 16 pixels) that’s used on your company Web site</td>
</tr>
<tr>
<td>Do you want the new suggestion group to appear in the autosuggest by default?</td>
<td>Yes</td>
</tr>
<tr>
<td>Which pages should the changes apply to?</td>
<td>All pages</td>
</tr>
</tbody>
</table>

To use a new icon and heading text for the suggestion group:

- Make a copy of the predefined Recent Items suggestion group.
- Update global search configurations to use your suggestion group.

Duplicating the Predefined Suggestion Group

1. Click Navigator > Setup and Maintenance.
2. In the Setup and Maintenance work area, go to the following:
   - Functional Area: Application Extensions
   - Task: Manage Applications Core Suggestion Groups
3. On the Manage Applications Core Suggestion Groups page, select the Recent Items group and click Duplicate.
4. In the new row, enter RECENTPAGES as the short name.
5. Change the display name to Recent Pages.
6. Change the description to Version of Recent Items with revised heading and icon.
7. With your new row still selected, click Edit.
8. In the Heading section, enter Recently Visited Pages in the Text field.
9. In the Icon field, enter the full URL to your .png file.
10. Click Save and Close.

Updating Global Search Configurations

1. Back in the Setup and Maintenance work area, go to the following:
   - Functional area: Application Extensions
   - Task: Manage Applications Core Global Search Configurations
2. Select the Default configuration and click Duplicate.
3. Fill out the row for your new configuration, selecting the Default check box.
4. With the row still selected, click the Edit icon.
5. In the Autosuggest tab, click the Refresh button in the Suggestion Group section if you don’t see your suggestion group.
6. Move the Recent Pages group into the **Selected Groups** list, and move the Recent Items group out.
7. In the **Enabled** column for the Recent Pages group, select **Yes**.
8. In the Appearance section, make sure that headings are set to be displayed.
9. Click **Save and Close**.
Customer Data Management: Overview

Managing customer data involves viewing and maintaining the information you keep about customers, including data about accounts, contacts, and households. You have additional options for enriching customer data.

Key Features

You can use customer data management functionality to:

- Prevent and identify duplicate data: You can identify duplicates during real-time or in a preconfigured batch. Real-time account and contact searching and matching prevents the creation of duplicate data. You can identify potential duplicate data based on preconfigured matching configurations.
- Verify and standardize addresses: You can perform real-time and batch address cleansing for account or contact address information. You can verify and cleanse addresses within an import batch during import. The addresses are verified against the master geography area and cleansed. The geography validation feature can also be enabled to check if the entered address maps to the geography hierarchy data available for the country.
- Resolve duplicate data: You can merge and link duplicate records to create master records that are the single source of truth. You can de-duplicate within an import batch as well as within the entire database. Customer data management uses a data quality engine to consolidate high quality account and contact data from multiple sources, manage duplicate data, enhance data with third-party content, standardize addresses, and monitor data quality. These data quality checks ensure cleansed, enriched, and complete customer information that can be trusted by the sales team.

For more details on customer data management implementation, see the Implementing Customer Data Management guide.

Accounts, Contacts, and Households: Overview

The Accounts pages let you manage the information related to your sales accounts, including customers, prospective customers, individual contacts, and households.

Use the account data management capabilities to:

- Create and update accounts, prospective accounts, contacts, and households
- Maintain account data and view data in hierarchical fashion
- View household relationships
- Enrich customer data

As your work with the account management application, keep in mind the following terminology:

- Account: An account is an organization that a salesperson sells to. Accounts can be prospects or customers.
- Contact: A contact is a single person. A contact need not be related to a customer. A person may also be both a customer as well as a contact of another customer.
Customer: A customer is someone with whom you have a selling relationship. The selling relationship can result from the purchase of products and services, or from the negotiation of terms and conditions that provide the basis for future purchases.

Household: A household is a group of contacts with whom you have a selling relationship. Households provide valuable segmentation information about the household as a whole, as well as summary of information about the household member contacts. Usually all the contacts reside at the same address and have a similar set of attributes that accounts do, such as team members, territories, and contacts.

B2B and B2C: Business-to-business and business-to-consumer, or B2B and B2C, are terms that indicate the type of customer relationship:
  - B2B: The customer is a business rather than an individual consumer.
  - B2C: The customer is an individual consumer rather than a business.

For more information on accounts, contacts, and households, see the related topics.

Related Topics
- Accounts: Explained
- Contacts: Explained
- Households: Explained

Account and Contact Preferences

Manage Contact Preference Information: Explained

Managing contact preference information includes creating and editing preferences about contact permissions and restrictions. You can manage contact preferences on the customer’s Edit Contacts page.

Creating and Reviewing Contact Preference Information

Administrators can view addresses or select contacts through Page Composer. You capture whether a preference has a restriction (Do not) and a reason code. You record a specific start date and can set an end date for the preference. You must review contact preference information for restrictions before taking any action.

Privileges Required for Managing Contact Restriction Information

Contact restriction information, such as opting in or out of the Public Do Not Call Registry, is captured as a Reason Code. Salespeople can create and edit contact preference information with any Reason Code that is not identified as Legal. To create and edit contact restriction information using a Reason Code that is tagged as Legal, you must add the HZ_LEGAL_CONTACT_PREFERENCES_PRIV privilege to the required role.

You can setup a reason code as legal by tagging the Reason Code lookup value. Tag the lookup type REASON_CODE with the value LEGAL using Manage Trading Community Common Lookups task.
Managing Personally Identifiable Information

Any piece of information that can potentially be used to uniquely identify, contact, or locate a single person is called personally identifiable information (PII). Administrators use PII to access information such as social security numbers, addresses, bank account numbers, phone numbers, and so on. PII is used to distinguish one person from another. The information includes both sensitive and nonsensitive data. PII is protected to prevent unauthorized use of personal information.

As a sales administrator, you can manage PII information. You can add or update PII data for your contacts. You must expose PII attributes from Application Composer or Page Composer in an active sandbox. For more information about how to enable the PII attributes, see topic, Managing Personally Identifiable Information: Worked Example in the Implementing Customer Data Management guide.

Related Topics

• Managing Personally Identifiable Information: Worked Example

Enabling Do Not Contact Functionality: Procedure

Use this procedure to set up the do not contact functionality for contacts in sales applications. The do not contact functionality enables you to set preferences for phone, email, and address of a contact.

This procedure covers these two scenarios of setting the preferences:

• Setting up the preference for a contact generally
• Setting up the preference for a specific phone, email, or address of a contact

Setting Up Do Not Contact Preference for a Contact Generally

You can set up the do not contact preference at the contact level. This sets a wide preference on all phones, emails, and addresses of the contact, indicating that this contact should not be contacted at all. Alternatively, you can also set the preference separately for all phones, all emails, or all addresses of a contact.

Perform the following steps to set up the do not contact preference for a contact.

1. Sign in as the sales administrator or as a setup user.
2. Ensure that you are working in an active sandbox.
3. Click Navigator > Configuration > Application Composer.
4. In the navigation tree, expand Standard Objects, Contact, and then Pages.
5. Ensure that the Simplified Pages tab is active.
6. In the Create Page Layouts section, select Default Layout and click the Edit icon.
7. In the Creation Layout: Default Layout page, click the Edit icon that appears next to Create Contact.
8. Select and move the following options from the Available Fields column to the Selected Fields column, depending on your requirement.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do Not Contact</td>
<td>Set a blanket do not contact preference at the contact level. This signifies that this contact must not be contacted at all.</td>
</tr>
<tr>
<td>Do Not Call</td>
<td>Set the contact preference at the phone level for a contact.</td>
</tr>
</tbody>
</table>
### Option Description

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do Not Email</td>
<td>Set the email preference for a contact.</td>
</tr>
<tr>
<td>Do Not Mail</td>
<td>Set the address preference for a contact.</td>
</tr>
<tr>
<td>All Phones</td>
<td>Enable the All Phones icon in the Create or Edit Contact page.</td>
</tr>
<tr>
<td>All Emails</td>
<td>Enable the All Emails icon in the Create or Edit Contact page.</td>
</tr>
</tbody>
</table>

9. Click **Save and Close**.
10. Click **Done**.

**Note:** If you want the Do Not Contact option to appear in the Create Contact page, then you must perform steps 1 to 9.

11. In the Details Page Layouts section, select **Default Layout** and click the **Edit** icon.
12. In the Details Layout: Default Layout page, click the **Profile** icon.
13. Click the **Edit** icon that appears next to Summary.
14. Click **Save and Close**.
15. Click **Done**.

**Note:** If you want the do not contact option to appear in the Edit Contact page, then you must also perform steps 10 to 15.

### Setting Up Do Not Contact Preference for a Specific Phone, Email, or Address of a Contact

You can also set the do not contact preference for a contact at a granular level, such for a specific phone, email, or address, if the contact has more than one.

### Setting Up Do Not Call

If a contact has multiple phone numbers, then you must first enable the **All Phones** option from the Application Composer. Then, you can enable the **Do Not Call** option for a specific phone number of the contact.

Perform the following steps to enable the Do Not Call preference for a specific phone number of a contact.

1. Perform steps in the "Setting Up Do Not Contact Preference for a Contact" section to enable All Phones.
2. Navigate to **Sales**, and then **Contacts**.
3. Activate a sandbox.
4. From the sign in user drop-down list, select **Edit Pages**.
5. In the Edit Pages dialog window, select the **Edit** button next to the **Site** layer, and click **OK**. The Editing: User Interface dialog window is displayed.
6. In the Contacts page, select a contact.
7. In the Edit Contact page, click the **Profile** icon.
8. Click the **All Phones** icon.
9. In the Editing: User Interface dialog window, click the **Select** button.
10. In the Manage All Phones dialog window, click any one of the columns, such as Primary, Type, or Number columns and select the **Edit Parent Component** option in the dialog box.
11. In the Component Properties dialog window, click the **Children** tab.

12. Select the **Do Not Call** and **Reason** options, and click **Apply** and then **OK**. Notice that the Do Not Call and Reason columns are now visible in the Manage All Phones dialog window.

13. In the Editing: User Interface dialog window, click the **Design** button.

14. In the Manage All Phones dialog window, select the **Do Not Call** option for a phone number. Notice that the do not contact icon is instantly enabled for the selected phone number.

15. Alternatively, select a reason from the Reason list.

16. Click **OK**.

### Setting Up Do Not Email

If a contact has multiple email addresses, then you must first enable the **All Emails** option from the Application Composer. Then, you can enable the **Do Not Email** option for an individual email address of the contact.

Perform the following steps to set up the Do Not Email preference for a specific email address of a contact.

1. Perform steps in the “Setting Up Do Not Contact Preference for a Contact” section to enable All Emails.

2. Navigate to **Sales**, and then **Contacts**.

3. Activate a sandbox.

4. From the sign in user drop-down list, select **Edit Pages**.

5. In the Edit Pages dialog window, select the **Edit** button next to the **Site** layer, and click **OK**. The Editing: User Interface dialog window is displayed.

6. In the Contacts page, select a contact.

7. In the Edit Contact page, click the **Profile** icon.

8. Click the **All Emails** icon.

9. In the Editing: User Interface dialog window, click the **Select** button.

10. In the Manage All Emails dialog window, click any one of the columns, such as Primary, Type, or Email columns and select the **Edit Parent Component** option in the dialog box.

11. In the Component Properties dialog window, click the **Children** tab.

12. Select the **Do Not Email** and **Reason** options, and click **Apply** and then **OK**. Notice that the Do Not Email and Reason columns are now visible in the Manage All Emails dialog window.

13. In the Editing: User Interface dialog window, click the **Design** button.

14. In the Manage All Emails dialog window, select the **Do Not Email** option for an email. Notice that the do not contact icon is instantly enabled against the selected email.

15. Alternatively, select a reason from the Reason list.

16. Click **OK**.

### Setting Up Do Not Mail

If a contact has multiple mailing addresses, then you must first enable **Multiple Address** from the Application Composer. Then, you must enable the **Do Not Mail** option, which is not available ready-to-use, for a specific mailing address of the contact.

Perform the following steps to enable Multiple Address and to set up the Do No Mail preference for a specific mailing address of a contact.

1. Perform steps 1 to 12 in the “Setting Up Do Not Contact Preference for a Contact” section.

2. Click **Show** in the Multiple Address section and click **Hide** in the Primary Address section.

3. Click **Done**.

4. Navigate to **Sales**, and then **Contacts**.

5. Activate a sandbox.

6. From the sign in user drop-down list, select **Edit Pages**.

7. In the Edit Pages dialog window, select the **Edit** button next to the **Site** layer, and click **OK**. The Editing: User Interface dialog window is displayed.

8. In the Contacts page, select a contact.
9. In the Edit Contact page, click the Profile icon. Notice that the Multiple Addresses table is enabled in the Addresses section.

10. In the Editing: User Interface dialog window, click the Select button.

11. In the Addresses section, click any one of the columns, such as Primary, Type, or Address and select the Edit Parent Component option in the dialog box.

12. In the Component Properties dialog window, click the Children tab.

13. Select the Do Not Mail and Reason options, and click Apply and then OK. Notice that the Do Not Mail and Reason columns are now visible in the Addresses section.

14. In the Editing: User Interface dialog window, click the Design button.

15. In the Multiple Addresses table of the Addresses section, select the Do Not Mail option for an address. The Do Not Mail contact icon is instantly enabled for the selected address.

16. Click Save.

Account Data Management

Enabling Display of Multiple Addresses: Explained

The edit pages for accounts, contacts, households, and partners automatically display a primary address region. However, you can change the view to display a table that lists multiple addresses.

How Address Details Display

Address details for accounts, contacts, households, and partners display on their respective Profile subtabs in edit mode.
For example, the following figure shows the Primary Address region, which displays on the Profile subtab for an account record. This is the default view of address details. Use Application Composer to display multiple addresses instead of just one primary address region.

**Edit Account: ABC Corporation... : Profile**

Considerations for Configuring Address Display Tables

Before you enable the table that displays multiple addresses, consider the following:

- In Application Composer, you must ensure that only one of the address regions is exposed at a time in the Detail pages layout. For example, expose Primary Addresses or Multiple Addresses on the page, but not both at the same time.
- The default type for Address is bill-to. You can configure the default address type using Default Address Type for Account and Default Address Type for Contacts profile options.
- An account can have one or more sell-to addresses (or address type as sell-to). Account territory assignment is based on the primary address, and the primary address can be any type, such as sell-to or bill-to.
- The default type when creating an account is Prospect. You can change the default type using the Account Type Default profile option. Similarly, you can use the Contact Type Default profile option to configure the default type when creating a contact.

Procedure for Enabling the Multiple Addresses Table

Use the following procedure to enable the table that displays multiple addresses.

1. Sign in as the sales administrator or as a setup user.
2. Ensure that you are working in an active sandbox.
3. Click **Navigator > Configuration > Application Composer**.
4. In the Objects navigation tree, expand Standard Objects and then expand the object whose pages you want to modify. For example, select the Account object.
5. Click the **Pages** node.
6. Ensure that the Simplified Pages tab is selected for either the account, contact, household, or partner object.

7. In the Details Page Layouts region, edit the relevant layout.

   If none exists, then duplicate the standard layout using the duplicate layout icon, and edit the resulting layout.

8. In the Details Layout page, click the **Profile** tab.

   In the Primary Address region and Multiple Address region, do one of the following:
   
   a. Click **Hide** to hide the region at runtime.
   b. Click **Show** to show the region at runtime.

   For example, to enable the display of multiple addresses, click **Hide** in the Primary Address region, and click **Show** in the Multiple Address region.

9. Click **Save and Close**, then **Done**.

10. Publish the sandbox.
Enabling Address Usage Types for Accounts: Procedure

You can assign usage types, such as bill-to or ship-to, to account addresses. Before you can assign the address usage types, you must enable the **Type** field in the Create Contact page.

You can assign address usage types to the following account types:

- Account
- Contact
- Household

The following type of usages can be assigned:

- Bill-to
- Ship-to
- Sell-to

Perform the following steps to enable the address usage for a contact in the Create Contact page:

1. Sign in as the sales administrator or as a setup user.
2. Activate a sandbox.
3. In the Setup and Maintenance area, go to the following:
   - Offering: Sales
   - Functional Area: Accounts and Contacts
4. From the sign-in user drop-down list, select **Edit Pages**.
5. In the Edit Pages dialog box, select **Edit** next to the Site layer, and click **OK**. The Editing: User Interface dialog box is displayed.
6. In the Contacts page, click **Create Contact**.
7. Enter the first name and last name of the contact.
8. In the Editing: User Interface dialog box, click **Select**.
9. Click the **Use account address** field and select the Edit Parent Component option in the dialog box.
10. In the Component Properties dialog box, click the **Children** tab.
11. Select the **Type** option, and click **Apply** and then **OK**. Notice that the **Type** field is now visible in the Address region.
This figure illustrates the Component Properties dialog box that appears when you click the Edit Parent Component option.

12. In the Editing: User Interface dialog box, click **Design**.
13. Click the **Type** drop-down list and select an address usage option, such as **Bill to**.
14. Click **Save and Close**.

### Setting Up Contextual Address Mapping

A contextual address is marked with an orange triangle, the **More** icon. When users hover over the triangle, an icon appears that they can click to display the address on a map. The Mapping Service for Contextual Addresses profile option determines the mapping service which you must use to display the map. In the Setup and Maintenance work area, use the following:

- **Functional Area**: Application Extensions or a product-specific functional area
- **Task**: Manage Application Toolkit Administrator Profile Values

### Profile Option Default

By default, the Mapping Service for Contextual Addresses profile option has no value.

⚠️ **Caution**: Until you enter a valid value for this profile option, users continue to get an error when they try to open a map for any contextual address.

### Profile Option Value

After you find and select the Mapping Service for Contextual Addresses profile option, enter a mapping service URL in the **Profile Value** column, for example:

- `http://bing.com/maps/?v=2&encType=1&where1=`
You can include parameters in the URL. For example, to avoid a locator box in Google Maps, add \&iwloc=\& to the URL. So, you would enter http://maps.google.com/maps?iwloc=\&\&output=embed&q= as the profile value.

Related Topics
- Setting Profile Option Values: Procedure
- Why can’t I see the map for contextual addresses

Merging Accounts and Contacts: Explained

This topic covers how you make merge requests and the profile options to consider when making a request to merge multiple records into a single record.

Making a Merge Request
You must have at least two records to merge. You perform a merge when you want to consolidate multiple or duplicate records into a single record.

Use the landing page for accounts or contacts to submit a merge request. Sales Customer Data Hub processes all merge requests; therefore, you must implement Customer Data Hub and set the profile option Merge Request Enabled to YES to enable merging of records.

You can select the records that you want to merge and then submit a request to merge them into a single surviving record. A successful merge request results in one surviving record and the status of all other duplicate records changes to Merged.

Requesting or Bypassing Approval of Merge Request
Your merge request is directly processed or is passed on for approval to a data steward manager depending on how you have set the User Merge Requests profile option.

If the profile option is set to Y (Allow Processing Without Approval), the request bypasses the data steward manager and is directly queued up for processing. Else, the merge request goes to the data steward manager for approval or rejection.

Related Topics
- Manual Merge: Explained
- Managing Rejected Merge Requests: Explained
- Automerge: Explained

Account and Contact Deduplication: Explained

You set profile options to control the display of duplicate identification pages where salespeople identify and resolve duplicate records when creating accounts and contacts.

If the application finds duplicate accounts or contacts, then the application displays the records in the duplicate notification page. Salespeople can either ignore the duplicate accounts and contacts and continue creating the record, or they can select the correct account or contact from the list.
Settings That Affect Deduplication

When salespeople create an account or a contact, the application searches for duplicate accounts or contacts based on one of these conditions:

- Data quality management configuration for accounts and contacts
- Exact name match profile options

The following table displays the profile options for account and contact deduplication.

<table>
<thead>
<tr>
<th>Profile Option Code</th>
<th>Profile Display Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZCM_ACC_DUP_NOTIFY</td>
<td>Show Duplicate Account Notification</td>
<td>Controls the display of the account duplicate notification page. Enabled by default.</td>
</tr>
<tr>
<td>ZCM_CON_DUP_NOTIFY</td>
<td>Show Duplicate Contact Notification</td>
<td>Controls the display of the contact duplicate notification page. Enabled by default.</td>
</tr>
<tr>
<td>ZCM_ACC_EXACT_NAME</td>
<td>Exact Account Name Match</td>
<td>Controls the display of potential duplicate accounts based on an exact name match, when Oracle Enterprise Data Quality does not present duplicate accounts. Disabled by default.</td>
</tr>
<tr>
<td>ZCM_CON_EXACT_NAME</td>
<td>Exact Contact Name Match</td>
<td>Controls the display of potential duplicate contacts based on an exact name match, when Oracle Enterprise Data Quality does not present duplicate contacts. Disabled by default.</td>
</tr>
</tbody>
</table>

Note: If data quality is not configured in your application and you require an exact name only match, then you must enable the ZCM_ACC_EXACT_NAME and ZCM_CON_EXACT_NAME profile options.

How Account and Contact Deduplication Is Performed

The following table describes the impact of different combinations of the account and contact deduplication profile options.

<table>
<thead>
<tr>
<th>Show Duplicate Account or Contact Notification</th>
<th>Exact Account or Contact Name Match</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disabled</td>
<td>Disabled</td>
<td>The application does not display potential duplicate accounts or contacts.</td>
</tr>
<tr>
<td>Enabled</td>
<td>Enabled</td>
<td>When creating an account or a contact, the application shows a list of potential duplicate accounts or contacts, based on the data quality configuration or an exact name match.</td>
</tr>
<tr>
<td>Disabled</td>
<td>Enabled</td>
<td>The duplicate notifications page is hidden.</td>
</tr>
<tr>
<td>Enabled</td>
<td>Disabled</td>
<td>This is the default setting.</td>
</tr>
</tbody>
</table>
When creating an account or a contact, the application shows a list of potential duplicate accounts or contacts based only on the data quality configuration.

### Related Topics
- Resolving Duplicate Accounts and Contacts
- Setting Up Data Quality Using Enterprise Data Quality: Explained

### Enabling Source System Reference in Accounts: Explained

This topic covers an overview of what a source system reference is and how you can view the referenced systems of an account record.

#### Reference System Overview

Source system reference is a unique ID that enables you to maintain a record of the source of the data in sales applications. Sales applications may use data from disparate systems running on different databases. When such data is consolidated, the source system reference is maintained using a unique reference key for cross-referencing. You can query the source system using the reference key (unique ID) to get more information about an account from the source system.
The following figure illustrates the edit page of an account where you add or view reference systems.

Enabling Source System References

You use the Reference Systems subtab to view or add source systems. This tab is not enabled in the shipped product, which means that you must explicitly enable the Reference Systems subtab.

To enable the Reference Systems subtab:

1. Sign in as the sales administrator or as a setup user.
2. Create and activate a sandbox.
3. Click Navigator > Configuration > Application Composer.
4. In the Objects navigation tree, select the Sales check box, expand Standard Objects, then expand Account.
5. Click the Pages node.
6. Ensure that the Simplified Pages tab is selected.
7. On the Details Layout page, click the Reorder Subtabs icon.
This figure illustrates the Configure Subtabs dialog that appears when you click the **Reorder Subtabs** icon.

8. In the Configure Subtabs dialog, move the Reference Systems subtab to the **Selected Subtabs** box.
9. Click **OK**, and then click **Done**.

Go to accounts simplified UI and edit a record. You can now see the reference systems subtab on the accounts UI.

**Related Topics**
- Managing Source System References: Explained

**Configuring Lists for Accounts and Assets: Explained**

Administrators can configure the lists of values that appear for accounts, contacts, households, and assets. Extensible lists of values let salespeople search and associate records using data that is relevant to their business needs. Salespeople can search using standard fields, view the fields in the search results, and then select relevant records.

The following are the configuration options:

- Create dynamic, role-based lists of value layouts
- Enable hidden standard fields for searching within a list of values
- Re-arrange fields in the search and result sections
- Define default values for search fields
- Mark certain fields as read-only or required

For more information on extending lists of values, see the Extending Sales guide.
How can I set Customer as the default account type?

You can set a default account type to Customer on the create account page by changing a profile option.

To change the profile option:

1. Sign in as the sales administrator or as a setup user.
2. In the Setup and Maintenance area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values
3. Enter `ZCA_ENABLE_SELLTO_ADDR_CHECKBOX` in the Profile Option Code field.
4. Click Search.
5. In the Profile Option: Profile Values region, set the Profile Value to Yes.

You have now set the default value of the account type to Customer.

Tip: To hide the Type field, use Application Composer. For more information on how to hide or show fields in simplified pages, see the Extending Sales guide.

Related Topics
- Extending Simplified Pages for Activities: Explained

Account Enrichment

Using Data Cloud to Enrich Accounts and Contacts

Data enrichment improves the quality of your existing account and account contact data, including addresses. Enrichment also enhances that data with additional information. You enrich sales accounts and contacts when you add social attributes, such as the LinkedIn URL or the Facebook URL, from Oracle Social Data and Insight Cloud Service.

Use Oracle Social Data and Insight Cloud Service to enrich your account and contact data. Social Data and Insight Cloud Service uses Dun and Bradstreet data as the primary source for enrichment. You can enable real-time data enrichment from Social Data and Insight Cloud Service within the sales applications. The service provides access to global company and contact records, and up-to-date information. Separate licenses are required for address verification and enriching accounts and contacts. For more information, see Configuring Social Data and Insight Cloud Service for Data Enrichment and Address Verification, in the Implementing Customer Data Management guide.

With Social Data and Insight Cloud Service, you can:
- Keep your company and contact data up-to-date by matching and cleaning existing company and contact records in all your applications.
- Meet business objectives by matching and enhancing your business contact data with external reference data.
• Improve the completeness, accuracy and integrity of data, which allows database validation, and competitive insights.

**Verifying Addresses**

Oracle Address Verification Cloud Service lets you verify and standardize addresses in your applications. Address cleansing is a process that corrects, parses, and completes and verifies address data, based on postal requirements. This address cleansing service is offered real-time, during the creation or edit of account and contact. Administrators must enable the address verification button on the account page. For more information, see Setting Up Geocoding and Address Cleansing, in the Getting Started with Your Customer Data Management Implementation guide.

Address verification lets you verify that the address data entered for an account, or contact, is a confirmed postal address. An address includes the first line of the address, such as a building number and street name. The process corrects, parses, completes, and verifies address data, based on postal requirements. Use Oracle Address Verification Cloud Service to fetch complete addresses and enriched account information from Dun & Bradstreet Corporation. A separate license is required for address verification. For example, you create an account but don’t know the postal code, by clicking Verify Address the service fetches the complete address.

You can use Address Verification Cloud Service for the following tasks:

• Search an address.
• Check if an address is valid.
• Correct an address.
• Get complete address from postal files.

For more information about verifying addresses, see Configuring Address Verification in the Getting Started with Your Customer Data Management Implementation guide.

**Related Topics**

• Address Verification
• Social Data and Insight Cloud Service
• Implementing Customer Data Management

**Enriching Account and Account Contact Data Manually: Explained**

You could manually enrich account and account contact data using the Oracle DaaS for Sales service.

To manually enrich account and account contact data:

1. Export the data you want to enrich to a CSV file.
2. Enrich the exported data using the Oracle DaaS for Sales service.
3. Download the enriched data file from Oracle DaaS for Sales service.
4. Import the enriched data file back into the application.

**Exporting Data to a CSV File**

You export account or account contact data using the Schedule Export Processes task. The export process provides two predefined objects, one each for exporting account and account contact data. While exporting data, select the Organization for Data Cloud Enrichment object to export account data and the Person for Data Cloud Enrichment object to export account contact data.
Enriching Data in the Oracle DaaS for Sales Service

You can manually enrich account or account contact data using the Enrich Data functionality of the Oracle DaaS for Sales service.

To enrich data, select the exported CSV file in the Enrich Data Records page of the Oracle DaaS for Sales service. You must select the CRM template during enrichment, so that the enriched file can be later downloaded in the Engagement Cloud. After enrichment is complete, a CSV file with the enriched data is available for download from the Jobs list.

For more information about Oracle DaaS for Sales service, see Using Oracle DaaS for Sales Service guide.

Importing Enriched Data

Use the file-based import functionality to import the enriched account or account contact data.

To import data using file-based import:

1. Create an import activity.
2. Enter the appropriate import details. While specifying the import object, select the Account to import account data and the Contact to import account contact data.
3. Provide the file mapping. Mapping defines the mapping between the columns provided in a source file and object attributes in the import file. Preconfigured mappings are available to import account data or account contact data from Oracle DaaS for Sales service. You must select Preconfigured Data to view the available preconfigured mappings.
   
   While specifying the import mapping, select Data Cloud Account Import mapping to import account data and Data Cloud Contact Import mapping to import contact data. The application then automatically maps the data in the CSV file to object attributes.
4. Schedule the import process.

Note: In some cases, the import activity may display a warning about source and target attributes. You can ignore the warning message and click OK to submit the import process.

Removal of Accounts, Contacts, and Households

Deleting Accounts, Contacts, and Households: Explained

By default sales administrators can delete accounts, contacts, and households. Other setup or administrative users, as needed, can be set up to delete these entities.

The following tables lists and describes the privileges you must have to delete accounts, contacts, and households:

<table>
<thead>
<tr>
<th>Object</th>
<th>Privilege</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Delete Sales Party</td>
<td>You cannot delete an account if it is a partner or competitor account, or if the account is the topmost tier in the account hierarchy.</td>
</tr>
<tr>
<td>Contact</td>
<td>Delete Sales Party Contact</td>
<td>You can delete standalone contacts. You must also have full access to all of the accounts associated to the contact. When</td>
</tr>
<tr>
<td>Object</td>
<td>Privilege</td>
<td>Additional Information</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Household</td>
<td>Delete Sales Party Duty</td>
<td>When you delete a household, you break the association between the household and all of its household members. However, you can still view the members as individual accounts or contacts.</td>
</tr>
</tbody>
</table>

### What happens when I delete an account?

When you delete an account, the entire record is removed from the sales application and cannot be restored.

In general, when you delete an account:

- The account party status becomes inactive in the database.
- The deleted account does not appear in the accounts list, account search, account list of values, account data quality match, segmentation, and recent items.
- The deleted account’s profile and children, such as attachments and notes, can no longer be viewed.
- The account’s contact relationships, if any, are deleted. The contact can still be viewed, but deleted contact relationships are not shown in the contact.
- Deleting an account does not delete account-related objects, such as opportunities, leads and tasks. You can still view related objects and the account name on these objects, but you can no longer access the deleted account’s details.

### What happens when I delete a contact?

When you delete a contact the entire record is removed and cannot be restored.

In general, when you delete a contact:

- The entire person record of the contact is removed, including all profile data, customer usages, group memberships.
- Relationships with associated customers or sales accounts are deleted.
- Contact points or other child objects specific to the customer-contact relationship are not shown.
- A deleted contact is not shown or available in any other contact or customer lists. A deleted contact is not visible to all contact types (standalone, single, or multiple) including a customer-contact, a consumer or prospect, or in cases where the contact is both a customer contact and a consumer or prospect.
- Even if you have the functional privilege to delete a contact, you cannot delete contacts unless you have full or edit access to at least one of the accounts associated with the contact.
What happens when I delete a household?

By default sales administrators can delete households. In general, when you delete a household:

- Any associations with members of the household are severed, but users can still see members as individual organizations or contacts.
- Users can’t see contact points for the household.
- Users can’t see deleted households in any account or contact lists.

Additional Configurations for Accounts and Contacts

Making the Account Field Required for Contacts: Procedure

You can configure the application to require sales personnel to associate an account with a contact when creating a contact. By default, the Account field is not required when creating a contact.

Making the Account Field Required

Use the following procedure to make the Account field required when sales personnel create a contact:

1. Sign in as the sales administrator or as a setup user.
2. Activate a sandbox.
3. Click Navigator > Sales > Contacts.
4. Click your user image or name in the global header and select Edit Pages.
5. In the Edit Pages dialog box, select the Site level and click OK.

The application changes to Page Composer design mode.

6. On the Contacts landing page, click Create Contact.
7. Enter a first and last name for the contact.
8. Enter an address in the Address Line field.
9. Click Select from the Page Composer tool bar.
10. Click the Account field and from the dialog box click Edit Component.
11. In the Component Properties dialog box for Account, select the Required check box.
12. Click Apply and click OK.

Setting Up Required Address Option for Accounts and Contacts

Administrators can set an address as required or optional depending on the type of account or contact. You can specify that an address is required and determine how the address appears on the UI.
Managing Profile Values

Use the Manage Administrator Profile Values task to specify that an address is required while creating an account. Profile options let you enable or disable address options for accounts and contacts. Use the following profile options to specify that an address is required while creating an account.

<table>
<thead>
<tr>
<th>Profile Option Code</th>
<th>Profile User Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZCA_ACCOUNT_ADDRESS_REQUIRED_ENABLED</td>
<td>Account Address Required</td>
<td>Specify whether an address is required while creating an account.</td>
</tr>
<tr>
<td>ZCA_CONTACT_ADDRESS_REQUIRED_ENABLED</td>
<td>Contact Address Required</td>
<td>Specify whether an address is required while creating a contact.</td>
</tr>
</tbody>
</table>

The following table lists the profile values and which types of accounts require the address to be entered. By default, the profile option setting is **Required for customer**.

<table>
<thead>
<tr>
<th>Profile Value</th>
<th>Description</th>
<th>Required for Account Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>The address is required.</td>
<td>All types of accounts.</td>
</tr>
<tr>
<td>No</td>
<td>The address isn't required.</td>
<td>The address is optional, regardless of the account type.</td>
</tr>
<tr>
<td>Required for customer</td>
<td>The address is required only for the account type that's set to this profile value.</td>
<td>The address is required only for customers.</td>
</tr>
</tbody>
</table>

To make the address required while creating an account:

1. Sign in as the sales administrator or as a setup user.
2. In the Setup and Maintenance area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values
3. Click the Manage Administrator Profile Values link.
   
The Manage Administrator Profile Values page appears.
4. Enter the code in the Code field, and click **Search**.
   
The application displays the profile option information.
5. In the Profile Values section, select **Yes** in the Profile Value field.
6. Click **Save and Close**.

Managing Address Formats

Use the Manage Address Format task to set up address attributes. The address format lets you manage the appearance of the address for accounts and contacts. For example, you can change the case of letters in an address, or mark a specific address attribute as required.
To specify which fields in an address are required:

1. Sign in as the sales administrator or as a setup user.
2. In the Setup and Maintenance area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Address Formats
3. Click the **Manage Address Formats** link.
   The Manage Address Formats page appears.
4. Select a country from the drop-down list.
5. In the Format Variation Layout area, select the fields that you want to set as required in the **Required** column.
6. Click **Done**.

**Enabling Household Relationship Views: Procedure**

After you have enabled the functionality, salespeople can view the relationships that exist among related contacts in a household. Salespeople use the Relationships subtab within the Accounts pages to view the hierarchy of the contacts related to households.

**Enabling Relationship Views**

You can show or hide panels or regions in the Households pages.

To show or hide the views:

1. Sign in as the sales administrator or as a setup user.
2. Activate a sandbox.
3. Click **Navigator > Configuration > Application Composer**.
4. In the Objects navigation tree, select the **Sales** check box, expand Standard Objects, then expand Household.
5. Click the **Pages** node.
6. Ensure that the Simplified Pages tab is selected.
7. In the Details Page Layouts region, edit the relevant layout.
   - If none exists for editing, then duplicate the standard layout using the duplicate layout icon, and edit the resulting layout.
8. Edit the duplicate layout.
9. Select the **Relationships** subtab, in the Details Layout area.
10. Show or Hide the following:
    - Relationship Diagram Panel:
        - This panel shows the graphical representation of the relationships in a household.
    - Household Contacts:
        - This panel provides a list view of the contacts in a tabular format.
    - Other Relationships:
        - Any other relationship appears in this section.
11. Click **Done**.
Enabling White Space Analysis Report Tab in Accounts: Procedure

You can enable the white space analysis report onto a tab in the Accounts pages. The tab is not enabled by default, so you must explicitly enable the white space analysis report tab. The white space analysis report enables salespeople to identify gaps in a customer’s portfolio so that they can focus on selling products or services that fill those gaps.

Prerequisite: Some recommendations and leads based on sales predictions rules must exist to populate the report with data. If no data is available to display, a message indicates there are no leads or recommendations to display.

Use the following procedure to enable the white space analysis report tab:

1. Sign in as a sales administrator and either create a sandbox or edit an existing sandbox, and designate it as an active sandbox.
   
   A sandbox provides an independent development environment so that you can fully test your changes before merging them with the main application and making them available to your users.

2. From the Navigator, click Structure in the Configuration menu.

3. Expand Sales and click Accounts.

4. Click Tab and update the Name, Icon, Visible, and Order for the white space analysis tab.

5. Click Save and Close.

6. Click the sandbox name that you created in Step 1. See the following example:

7. Click More.

8. Click Publish.

The white space analysis tab is now available to users in the Accounts pages.

Related Topics

- Configuring Navigation and Home Page: Overview
- How can I access the white space analysis report
- Selecting Products for Recommendations: Points to Consider
- Managing Prediction Rules: Examples
Configuring the Address Verification Cloud Service

For salespeople to verify an address in the search mode, administrators must set up the search mode in the Enterprise Data Quality configuration. Salespeople benefit from the setup as they can search and select from multiple similar addresses when verifying account or contact addresses.

For more information, see Verify Search Mode on Account or Contact Creation Page and Enabling Search Mode for Address Verification Cloud Service.

Related Topics

- Getting Started with Your Customer Data Management Implementation

Managing Account, Contact, and Household Contracts: Explained

As an administrator, you can enable the Contracts tab within the Accounts pages using Oracle Application Composer. From the Contracts tab, salespeople can view and download contracts associated with accounts.

Customer Assets

Setting Up Sales Assets: Overview

Assets are high-net-worth products owned by an organization. After the functionality is enabled by the administrator, salespeople can create and manage assets associated with their customers and associate assets with activities like appointments and tasks.

Sales users access assets in the following ways:

- Click **Sales > Assets** on the springboard to use a full set of create, edit, and manage assets capabilities.
- Manage assets within the context of accounts.
- Associate assets with activities, such as tasks and appointments.
- Create an organization-level view of calendars associated with assets.
- Associate assets with opportunities and leads.

Setup Options for Assets

The following table describes the setup configurations available for Assets.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
<th>Where to Find More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expose the Assets icon in the springboard</td>
<td>The Assets icon is not available by default from the Sales springboard. You can enable it to give salespeople access to the Assets pages.</td>
<td>See:</td>
</tr>
</tbody>
</table>
<pre><code>                                                                                                | - The section in this topic, Exposing the Assets Icon in the Springboard |
</code></pre>
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
<th>Where to Find More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable the Asset list of values in Activities</td>
<td>The Asset list of values is not available by default in the Activities pages. You can expose the</td>
<td>See the related topics</td>
</tr>
<tr>
<td>pages</td>
<td>Assets list of values in activities, including in appointments, call reports, and tasks, to allow</td>
<td>• See the topic, Enabling Assets in Activities, in the Implementing Sales guide.</td>
</tr>
<tr>
<td></td>
<td>salespeople to associate an asset with activities.</td>
<td>• Also see the topic, Extending Simplified Pages for Activities: Explained, in the Extending Sales</td>
</tr>
<tr>
<td>Enable the Leads and Opportunities subtabs</td>
<td>The Leads and Opportunities subtabs are not available by default in the Assets pages. You can</td>
<td>See these topics in the Implementing Sales guide:</td>
</tr>
<tr>
<td>in the Assets pages.</td>
<td>expose the subtabs in the Assets pages to allow salespeople to associate leads and opportunities with</td>
<td>• Enabling the Leads Subtab in Assets</td>
</tr>
<tr>
<td></td>
<td>assets.</td>
<td>• Enabling the Opportunities Subtab in Assets</td>
</tr>
</tbody>
</table>

**Exposing the Assets Icon on the Home Page**

The Assets icon is not available by default from the Sales springboard. You enable it using the Structure page, to give salespeople access to the Assets pages. Use the following procedure.

1. Sign in as the sales administrator or as a setup user.
2. Activate a sandbox.
3. Click **Navigator > Structure**.

   The Structure page appears.

4. In the Structure page, ensure that the **Navigation Configuration** tab is selected.
5. Expand the **Sales** node and click the **Assets** link.

   The Edit Page Entry: Assets appears.

6. In the Edit Page Entry: Assets page, do the following:

   a. In the **Navigator** field, select Yes.
   b. In the **Springboard** field, select Yes.
   c. Click **Save and Close**.

7. Verify the changes by signing in as a user with access to the Sales pages, such as a sales representative. Ensure you can see the Assets icon on the Sales springboard.
8. Publish the sandbox.

For more information about modifying the UI, and using sandboxes, see the Getting Started with Extending Sales and Extending Sales guides.

**Sales Catalog Integration**

The Assets application is automatically integrated with the sales catalog and with sales products. In the assets pages, lists of values appear for products and product groups that are included in the catalog. For more information, see the Setting Up Sales Catalogs and Setting Up Products chapters in the Implementing Sales guide. Also see the sales user topics on using assets in the Using Sales guide.
Import and Web Service Integration
You can import assets using file-based data import. You can also use web services to create an asset. For more information, see the following guides:

- SOAP Web Services for Common Features in Oracle
- Understanding File-Based Data Import and Export

See the Oracle Help Center for guides.

Related Topics

- Enabling Assets List of Values in Activities
- Enabling the Opportunities Subtab in Assets
- Enabling the Leads Subtab in Assets
- Configuring Navigation and Home Page: Overview
- Oracle Help Center

Assets Saved Search: How It's Configured
You can configure the number of days, in the past, from the current date, for which the application retrieves records for the All My Customer’s Assets saved search.

Setting the Profile Option for the Saved Search
The profile option, Default Asset Purchase Date (ZCM_ASSET_DEFAULT_PURCHASE_DATE), controls the behavior of the saved search based on the asset’s purchase date. To set the profile option, perform the following steps:

1. Sign in as the sales administrator or as a setup user.
2. In the Setup and Maintenance area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values
3. Search for the profile option using either the code or the display name.
4. Set the profile value as required.
5. Click Save and Close.

How the Profile Option Is Calculated
If you select 60 in the profile option, then the application retrieves all those assets whose purchase date is within 60 days of the current date.

Similarly, you can select 90 or 180 days, and the application retrieves assets whose purchase date is within the selected days from the current date.

Note: You can update or remove the purchase date from the Advanced Search option.
Asset Security: Overview

By default, the standard Sales job roles, such as Sales Representative and Sales Manager, have access to the Assets UI. If you want to configure Assets security, use the information in this topic.

If duty roles are not configured, then you require one of the following to view, create, edit, delete, and export assets:

- Sales Party Review Duty (grants view access only)
- Sales Party Management Duty
- Marketing Sales Party Management Duty

The duty roles can be configured by adding or removing the following privileges:

- View Assets
- Create Asset
- Edit Asset
- Delete Asset

For more information, see the Securing Sales guide.

Business Plans

Business Plans: Overview

Business plans are a set of goals that an account or partner wants to accomplish. Business plans allow both brand owners and partners a way to show their commitment to the partnership.

The following table shows business plan components:

<table>
<thead>
<tr>
<th>Components</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Plan Header</td>
<td>Key information about business plan, its duration and partner or account information.</td>
</tr>
<tr>
<td>SWOT</td>
<td>The strength, weaknesses, opportunities, and threats of a business plan.</td>
</tr>
<tr>
<td>Team</td>
<td>Resources who have an access to business plans.</td>
</tr>
<tr>
<td>OSN Integration</td>
<td>Integration with Oracle Social Network. Enables collaboration with to share information with team members.</td>
</tr>
<tr>
<td>Activities</td>
<td>The integration with Activities enables business plan users to manage associated tasks, appointments, and call logs.</td>
</tr>
<tr>
<td>Notes</td>
<td>Manage the associated notes.</td>
</tr>
</tbody>
</table>
Users can create business plans for other objects such as Territories, Opportunity, and Product. The objects partner and accounts are enabled for business plans in a ready to use application. A business plan attribute class is used to determine for what object a business plan is created. Two business plan classes Partner and Account are available, but others can be added. Use the Manage Business Plan Classes task to enable account business plans for customers. For information on how to enable account classes, see Enabling Account Classes, in Implementing Sales.

**Partner Business Plans**

Partner business plans consist of partner’s goals that are primarily used by channel account managers and their counterparts partner sales managers. The plans include specific objectives that the partner can follow to meet the business plan goals. Partner business plans provide a means of collaboration between brand owners and their partners in defining strategic goals. Account business plans consist of goals for the sales representatives and sales managers for the specific account or accounts that they manage.

**Related Topics**

- Account Business Plans: Overview
- Managing Partner Business Plans: Overview
- Adding Business Plans

**Managing Business Plan Classes: Points to Consider**

As a sales administrator you can manage business plans and their classes.

The following table shows business plan features and what you can do with them:

<table>
<thead>
<tr>
<th>Business Plan Feature</th>
<th>What You Can Do</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>User-defined classes</strong></td>
<td></td>
</tr>
</tbody>
</table>
  - Rename the supplied classes, add classes, and mark classes as disabled.  
  - Use the Manage Business Plan Classes task to rename the lookup type values. The account and partner classes are supplied in the ready to use application.  
  - In addition to those used for partners or accounts, you can add business plan classes that define more business plans, such as territories business plans. |
| **Supplied business plan classes** |  
  - Access the following supplied business plan classes:  
    - Partner  
    - Account  
  - Enable and disable any of the supplied classes using the Manage Business Plan Classes task. |
| **Default business plan class** |  
  The default business plan class is determined by the business plan class settings. A class represented by an enabled look up code with the lowest Display Sequence is selected as the default class of a new business plan. You can view and manage business plan classes using in Manage Business Plan Classes task. You can import business plans of any class that is specified and enabled in Manage Business Plan Classes task. |
| **Conditionally required partner or account information** |  
  Partner information is required only if the class of the business plan is Partner. Similarly, account information is required only if the class of the business plan is Account. |
| **Owner list of values** |  
  The Owner list of values depends on the class of the business plan. For the Partner class, the list of values shows selected partner team members as the candidates for the business plan owner. |
Integrating Business Plans with Oracle Social Network

You must configure the social network integration to business plans so that the business plans can be published on the social network. You must expose the following business plan attributes using the Application Composer.

The following business plans attributes can be enabled:

- Class Code
- Name
- Number
- Type
- Created By
- Creation Date
- Description
- Last Update Date
- Last Updated By
- Owner
- Partner Name
- Period End Name
- Period Range
- Period Type
- Period Start Name
- Status

Setting Up Business Plans

To set up business plans for Oracle Social Network:

1. Navigate to Manage Oracle Social Network Objects.
2. Expand the Common CRM folder.
4. Click **Enable Object** at the table-level.
5. In the Business Plan: Enable Object pop-up window, select the **Manual** option.
6. In the Business Plan: Attributes table add attributes that you want to share using Oracle Social Network.
7. Click **Save**.
8. Click **Synchronize** page-level action.
Enabling Account Business Plans

In the ready to use application, the default class of business plans is partner business plans. If your requirement is to only manage partner business plans, then you do not need to make any changes related to the business plan class.

If you manage only account business plans, then you must make only one change related to the business plan class in the task Manage Business Plan Classes. You can either disable all classes except for Account class, or make sure that the display sequence for the account class is the smallest. After the change is made the partner attribute is not visible on the Create Business Plan and Edit Business Plan pages, and instead the account attribute is rendered. If you manage both partner and account business plans, then you must ensure that both partner and account classes are enabled using Manage Business Plan Classes task. The class attribute must be exposed in the Create Business Plan page so that users can select a business plan class during the creation process.

To change the business plan, perform the following steps:

1. Sign in as a setup user.
2. Create and activate a sandbox.
3. Click **Navigator > Configuration > Application Composer**.
4. In the Objects navigation tree, select the **Sales** check box, expand Standard Objects, then expand Business Plans.
5. Click the **Pages** node.
7. Edit the new layout by adding Account and Class fields on the Landing Page Layout.
8. Duplicate the Standard Layouts for Create and Details layouts.
9. Add Class field in the Creation Page Layouts, and optionally the Details Page Layouts on the Business Plan page.
10. Ensure that the layout status for your new layout is Active.
11. Test the changes.
12. Publish the sandbox.

**Related Topics**

- Managing Partner Business Plans: Overview

Viewing Business Plan Lookups

You can view lookups that are supplied in a business plan and also add values to them. Lookups corresponding to business plan classes, business plan types, business plan statuses, and business plan team member functions have dedicated tasks namely:

- Manage Business Plan Classes
- Manage Business Plan Types
- Manage Business Plan Statuses
- Manage Business Plan Team Member Functions

Other lookups are covered by the Manage Business Plan Configurable Lookups task. To view business plan lookups:

1. Sign in as the sales administrator or as a setup user.
2. In the Setup and Maintenance area, go to the following:
   - Offering: Sales
   - Functional Area: Customer Center
Task: Manage Business Plan Configurable Lookups

3. View the remaining lookup types.
4. Click any lookup type to see the lookup codes.

Integration with Third Parties

Third-Party Integrations for Sales Customers: Explained

You can use the Account, Contact, and Household interfaces to gain a comprehensive view of your customer information. This functionality utilizes sales data, as well as relevant third-party content.

Third-Party Integrations for Sales Customers

OneSource and Siebel CRM are two third-party integrations that you can configure in sales applications. This topic explains how you map third-party customer data to sales customers.

Mapping OneSource Data Sales Application

You access OneSource data directly from the OneSource node on Sales Account, Contact, and Household information trees. The sales application searches for OneSource company data in the following order:

1. Search based on the mappings defined in the **HZ_ORIG_SYS_REFERENCES** table, where **orig_system** is **ONESOURCE**.
2. Search based on the sales customer stock symbol, checked if no mapping is found in **HZ_ORIG_SYS_REFERENCES**.
3. Search based on the sales customer name, checked if no mapping is found by the stock symbol lookup. If multiple OneSource companies match the sales customer name, you can choose from the list of matching OneSource companies.

Mapping Siebel CRM Service Data to Sales Application

You access mappings for Siebel CRM accounts, contacts, and groups to sales customers in the **HZ_ORIG_SYS_REFERENCES** table, where **orig_system** is **SIEBEL**.

Note: The sales application does not include licenses for OneSource and Siebel CRM. You must acquire third-party application licenses separately. If you want to enable OneSource and you have a web proxy for external HTTP(S) traffic, you must select Enable Web Proxy on the Web Proxy Configuration screen and specify your web proxy configuration.

Enabling the LinkedIn Sales Navigator

The sales application integrates with LinkedIn Sales Navigator. The integration maps LinkedIn profiles with sales records and renders relevant contacts details to salespeople. Salespeople can thus target, understand, and engage with contacts directly within the sales application. Salespeople can view the LinkedIn Sales Navigator on the Profile subtab of the Contact details page.

Note: The integration does not synchronize data between the sales application and LinkedIn, therefore data is not stored in either application.
For salespeople to use the LinkedIn Sales Navigator, they must have a LinkedIn account. An administrator can enable the navigator using Application Composer. To enable the sales navigator:

1. Sign in as the sales administrator or as a setup user.
2. Create and activate a sandbox.
3. Click **Navigator > Configuration > Application Composer**.
4. In the Objects navigation tree, select the **Sales** check box, expand Standard Objects, then expand **Contact**.
5. Click the **Pages** node.
6. Ensure that the Simplified Pages tab is selected.
7. In the Edit Contact region, select the standard layout page, then click the duplicate layout icon to duplicate and edit the resulting copy.
8. In the new Details Layout page, click the **Profile** tab.
9. Click the **Show** link for the LinkedIn Sales Navigator region.
10. Click **Save and Close**, and then click **Done**.
11. Publish the sandbox.
12. Verify that the LinkedIn Sales Navigator is enabled on the **Edit Contact** page.
Setting Up Activity Notifications: Explained

When setting up activity notifications, you can configure company-level and user-level notifications. You also can set the default appointment reminder, and the default appointment duration, calendar view, and calendar start time.

Setting Up Company-Level Notifications

If you enable email notifications at the company level, each individual user can still choose not to receive email notifications. If you enable notifications in the notification list, each individual user can still choose not to receive notifications in the notification list.

You can specify whether users:

- Receive notifications as owners of an activity
- Receive notifications if they are not the owners of an activity
- Receive task notifications if changes are made to completed tasks

You can specify the following for both appointments and tasks:

- Whether users receive email notifications
- Whether users receive notification messages in the notifications list

The following table lists the profile options that administrators control at the company level.

<table>
<thead>
<tr>
<th>Profile Option Name</th>
<th>Default Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Notification to Contacts and Consumer Customers Enabled</td>
<td>N</td>
<td>Enables notifications delivery to external participants when tasks are created, updated, or deleted.</td>
</tr>
<tr>
<td>Appointment Notification to Contacts and Consumer Customers Enabled</td>
<td>Y</td>
<td>Enables notifications delivery to external participants when appointments are created, updated, or deleted.</td>
</tr>
<tr>
<td>Appointment Notification With iCal</td>
<td>Y</td>
<td>Enables iCalendar attachments to be delivered with appointment notifications. Disable if using CRM for Microsoft Outlook to prevent the creation of duplicate appointments.</td>
</tr>
<tr>
<td>Disable Appointment E-Mail Notification</td>
<td>N</td>
<td>Specifies whether to disable appointment email notifications for the entire company.</td>
</tr>
<tr>
<td>Disable Task E-Mail Notification</td>
<td>N</td>
<td>Specifies whether to disable task email notifications for the entire company.</td>
</tr>
</tbody>
</table>
Implementing Sales

Chapter 12

Setting Up Activities

<table>
<thead>
<tr>
<th>Profile Option Name</th>
<th>Default Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disable Task Notification List</td>
<td>N</td>
<td>Specifies whether to disable task notifications in the notifications list for the entire company.</td>
</tr>
<tr>
<td>Disable Appointment Notification List</td>
<td>N</td>
<td>Specifies whether to disable appointment notifications in the notifications list for the entire company.</td>
</tr>
</tbody>
</table>

Setting Up User-Level Notifications

You can set several profile options at the user level to control the behavior or notifications. The user preference setting are stored in the profile options. Users can set notification preferences using the preferences pages, located in the menu with their user name or image in the global header. The following table lists the profile options that administrators can set at the user level.

<table>
<thead>
<tr>
<th>User Name</th>
<th>Default Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment Owner Notifications</td>
<td>N</td>
<td>Enables receiving appointment notifications when the user is the owner of the appointment.</td>
</tr>
<tr>
<td>Appointment Resource Notifications</td>
<td>Y</td>
<td>Enables receiving appointment notifications when the user is a resource or invitee of the appointment.</td>
</tr>
<tr>
<td>Task Owner Notifications</td>
<td>N</td>
<td>Enables receiving task notifications when the user is the owner of the task.</td>
</tr>
<tr>
<td>Task Resource Notifications</td>
<td>Y</td>
<td>Enables receiving task notifications when the user is a resource on the task.</td>
</tr>
<tr>
<td>Task Notifications For Completed Tasks</td>
<td>N</td>
<td>Enables receiving task notifications for tasks that have already been completed.</td>
</tr>
<tr>
<td>Notification List Appointment Notifications</td>
<td>Y</td>
<td>Enables receiving appointment notifications in the notifications list.</td>
</tr>
<tr>
<td>Email and List Appointment Notifications</td>
<td>NA</td>
<td>Enables receiving appointment notifications in the notifications list and through email.</td>
</tr>
<tr>
<td>E-Mail Task Notifications Enabled</td>
<td>Y</td>
<td>Enables receiving task notifications by email.</td>
</tr>
<tr>
<td>E-Mail Appointment Reminders Enabled</td>
<td>Y</td>
<td>Enables receiving appointment reminders by email.</td>
</tr>
</tbody>
</table>

Profile Option Name   | Default Value | Description                                                                                                                   |
|----------------------|---------------|------------------------------------------------------------------------------------------------------------------------------|
Disabling Notifications for the Entire Company

You can disable activity notification globally, so that no one in the company receives notifications. To disable notifications:

1. Sign in as the sales administrator or as a setup user.
2. In the Setup and Maintenance area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values
3. Enter the profile option to disable email or appointment notification, in the Profile Option Code field.

The following table lists the profile options that you can disable.

<table>
<thead>
<tr>
<th>Option to Disable</th>
<th>Profile Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment e-mail notification to entire company</td>
<td>ZMM_ACTIVITY_DISABLE_EMAIL_APPT_NOTIF</td>
</tr>
<tr>
<td>Task e-mail notification to entire company</td>
<td>ZMM_ACTIVITY_DISABLE_EMAIL_TASK_NOTIF</td>
</tr>
<tr>
<td>Appointment notification in the notification list for the entire company</td>
<td>ZMM_ACTIVITY_DISABLE_LIST_APPT_NOTIF</td>
</tr>
<tr>
<td>Task notification in the notification list for the entire company</td>
<td>ZMM_ACTIVITY_DISABLE_LIST_TASK_NOTIF</td>
</tr>
</tbody>
</table>

4. For each profile option you choose to disable, change the site-level profile value to Yes.

Enabling Drill-Down Capabilities in Notifications

You can enable salespeople to drill down to an activity from a notification list or an email. To use the enhanced notifications feature, salespeople must set their preferences to accept notifications. You enable the enhanced capabilities by opting in
to the feature and setting profile options. With enhanced notifications, salespeople can take actions on an activity from a notification list or an email. For example, they can click a link in an email to accept or decline an appointment or mark a task as completed.

> **Note:** While you can revert to opt out of the enhanced notifications, Oracle recommends that you do not opt out of the enhanced notifications between releases.

### Setup Overview

Perform the following steps to set up the enhanced notifications:

2. Set site-level profile options that enable the notifications.
3. Set profile options that enable the users to set their preferences for notifications. The profile options can be set at site-level or user-level.

If salespeople opt in for the capability to drill down and act from activity notifications, then they receive both a notification list and an email. Salespeople do not have the option to choose only one type of notification.

### Opting in to Activity Drill-Down and Actionable Notifications

To opt in to the Activity Drill-Down and Actionable Notifications feature:

1. Sign in as a setup user.
2. In the Setup and Maintenance area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
3. Click the drop-down button on Sales Foundation.
4. Click **View Feature Selection**.
   - The Edit Features: Sales Foundation page appears.
5. Select the **Enable** check box for Activity Drill-down and Actionable Notification.
6. Click **Done**.

To revert to the earlier setup, clear the Enable check box.

### Setting Profile Options for Enhanced Notifications

Use profile options to enable email or list notifications at the site level. After you enable the profile options, if salespeople opt in for enhanced notifications, then they receive both list and email notifications with drill-down capabilities.

To set the profile options:

1. Sign in as a sales administrator or as a setup user.
2. In the Setup and Maintenance area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values
3. In the **Profile Display Name** field or **Profile Option Code** field, enter the profile option name or code and click **Search**.
The following table lists the profile options.

<table>
<thead>
<tr>
<th>Profile Display Name</th>
<th>Profile Option Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email and List Appointment Notifications Enabled</td>
<td>ZMM_ACTIVITY_APPT_NOTIF_LIST_EMAIL</td>
<td>Enables appointment notifications in notification lists and emails.</td>
</tr>
<tr>
<td>E-Mail and List Task Notifications Enabled</td>
<td>ZMM_ACTIVITY_TASK_NOTIF_LIST_EMAIL</td>
<td>Enables task notifications in notification lists and emails.</td>
</tr>
</tbody>
</table>

In addition to enabling the site-level profile options, you must also enable profile options for the user preference settings. The following table lists the profile options that you enable at site or user level.

<table>
<thead>
<tr>
<th>Profile Display Name</th>
<th>Profile Option Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email and List Task Notifications Enabled as per User Preference</td>
<td>ZMM_ACTIVITY_TASK_NOTIFICATIONS</td>
<td>Use to enable users to receive task notifications in the notification list and through email according to their preference settings.</td>
</tr>
<tr>
<td>Email and List Appointment Notifications Enabled as per User Preference</td>
<td>ZMM_ACTIVITY_APPT_NOTIFICATIONS</td>
<td>Use to enable users to receive appointment notifications in the notification list and through email according to their preference settings.</td>
</tr>
</tbody>
</table>

For more information see the related topics.

**Related Topics**
- Approval Management: Overview

### Setting Up Call Reports: Points to Consider

Call reports let salespeople capture the outcome of a sales activity, make related changes, and track key updates. When setting up call reports, consider the following points:

- You can modify lookup types and profile options related to call reports.
- You must set up Oracle Social Network if you want salespeople to be able to share call reports using the social networking tool.
- You can configure call reports using Oracle Application Composer, to suit the requirements of your organization.

### Modifying Activity Objectives and Outcomes

Call reports record a snapshot of the outcome of a sales activity, including summaries, meeting minutes, complete objectives, attendees, attachments, notes, and so forth. You can use the Manage Activity Standard Lookups task in the Setup and Maintenance work area to update or modify the information for activity objectives and outcomes.

The following table shows the lookup types you can modify for objectives and outcomes.
<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Display Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ORA_ZMM_ACTIVITY_OBJECTIVE</td>
<td>Activity Objective</td>
<td>Purpose of the sales activity. For example, demo of a product, discuss a proposal.</td>
</tr>
<tr>
<td>ZMM_ACTIVITY_OUTCOME</td>
<td>Activity Outcome</td>
<td>Results of the customer activity. For example, call answered, captured issue.</td>
</tr>
</tbody>
</table>

Setting Call Reports to Read-Only

Use the Submit Call Report Action Enabled (ZMM_ACTIVITY_ENABLE_SUBMIT_CALL_REPORT) profile option to enable submission of call reports. The options are as follows:

- Yes: The Submit button is enabled on the Create Call Report page. When you click Submit, the call report is set to read-only, and you cannot modify the call report.
- No: The Submit button is not displayed on the Create Call Report page. This is the default value.

Access the profile option from the Manage Administrator Profile Values task in the Setup and Maintenance work area.

Related Topics
- Call Reports: Explained

Changing Activity Calendar Colors: Worked Example

You can change the color of various items on the calendar.

You can use any standard HTML color codes. You can find color codes in many places on the internet, for example, http://html-color-codes.info/.

Changing the Color of Calendar Items

1. Sign in as the sales administrator or as a setup user.
2. In the Setup and Maintenance area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Activity Standard Lookups
3. Click ZMM_ACTIVITY_TYPE. The ZMM_ACTIVITY_TYPE: Lookup Codes area appears.
4. In the Tag field, enter an HTML color code in for each item you want to change.
5. Click Save and Close.
Exposing the Address Selector on Activity Pages

As a sales administrator you can enable selection of addresses from a drop-down list. From the address selector users can then select an address that is associated with an activity’s account or contact. You can expose the address selector using the Application Composer. The address for activities can be exposed on the create and edit pages of tasks, appointments or call reports.

To expose the address selector:

1. Sign in as a sales administrator.
2. Create a sandbox and make it active.
3. Click Navigator > Configuration > Application Composer.
4. In the Objects navigation tree, select the Sales check box, expand Standard Objects, then expand Activity.
5. Click the Pages node.
6. Ensure that the Simplified Pages tab is selected.
7. Scroll down on the Simplified Pages tab to any of the following sections where you want to expose the address selector.
   - Details Page Layouts: Task Details, Call Report Details, Appointment Details.
8. Duplicate the required standard layout and edit the resulting copy.
9. Click Show next to the Address option to enable the address selector.
10. Click Done.

Users can now view the address selector on the Activity page on the UI.

To validate whether the address selector is available on the Activities UI:

a. Navigate back to the respective Task, Appointment, or Call Report pages.

b. Click Create or Edit on the Task, Appointment, or Call Report page on which you enabled the address selector.

You can view the address selector on the page.

Enabling Activity Delegation: Procedure

You can enable the ability for all sales users in your implementation to delegate their activities, such as calendar appointments and tasks, to another user. To enable the delegation functionality, you set separate profile options for appointments and tasks.

When a user delegates an activity, he simply changes the owner of the activity. After a user delegates an activity to another user, both the user (who is the original owner) and the person to whom the activity is delegated (the new owner) can edit or update the activity.

To enable activity delegation:

1. Sign in as a sales administrator or as a setup user.
2. In the Setup and Maintenance area, go to the following:
   - Offering: Sales
3. Search for and set two profile options according to your business needs. The following table lists the profile options.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Profile Option Code</th>
<th>Description and Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment Delegation Enabled</td>
<td>ZMM_ACTIVITY_APPT_DELEGATION</td>
<td>Enables sales users to delegate appointments to other sales users. Set to Yes at site level to enable all users in the site to use the delegation feature.</td>
</tr>
<tr>
<td>Task Delegation Enabled</td>
<td>ZMM_ACTIVITY_TASK_DELEGATION</td>
<td>Enables sales users to delegate tasks to other sales users. Set to Yes at site level to enable all users in the site to use the delegation feature.</td>
</tr>
</tbody>
</table>

4. Save your changes.

Enabling Default Task Status: Explained

Administrators can set the default status of a task and provide a sequence number using the lookup type ZMM_ACTIVITY_STATUS_CD. The sequence that you define determines the sequence in which the task statuses are available for selection in the list of values. The lowest sequence number corresponds to the default status of the task.

1. Sign in as a sales administrator or setup user.
2. In the Setup and Maintenance area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Activity Standard Lookups
3. In the Manage Activity Standard Lookups page, click the ZMM_ACTIVITY_STATUS_CD link.
   The ZMM_ACTIVITY_STATUS_CD: Lookup Codes area appears.
4. Enter a display sequence. The lowest sequence number defines the default status of a task.
5. Click Save and Close.

Activity Search and Views

Enabling Record Sets for Activities

For salespeople to view the filter option All records I can see, you must set the profile option ZMM_ACTIVITY_ENABLE_ALL_RECORDS to Yes. You can set the filter at the site level and at the user level. You must set the user level to Yes, and add the user names for salespeople, to view the option in the Advanced Search record set.

To enable the profile option:

1. Sign in as a sales administrator or setup user.
2. In the Setup and Maintenance area, go to the following:
   - Offering: Sales
   - Functional Area: Activity
   - Task: Manage Activity Profile Options

3. Click the `ZMM_ACTIVITY_ENABLE_ALL_RECORDS` link.
   The Manage Activity Profile Options page appears. By default, the `ZMM_ACTIVITY_ENABLE_ALL_RECORDS`: Profile Values region appears with the profile level as Site and the value set to No.

4. To enable access at the site level, select Yes in the Profile Value field.

5. To enable access at the user level, click the `Add` icon.
   A new row appears with User in the Profile Level field.

6. Add the name of the user, in the User Name field, and select Yes in the Profile Value field.

7. Click `Save and Close`.

Activities and Assets

Integrating Assets with Activities: Overview

After the administrator enables the functionality, salespeople can associate assets with activities, including appointments, call reports, and tasks.

Associating an asset with an activity and then viewing the asset calendar helps salespeople manage their appointments. Salespeople can view all the related appointments in a single place. After someone in the organization associates an asset with an appointment, then the asset calendar is enabled.

For more information about setup details, see Enabling Assets in Activities, in the Implementing Sales guide.

Related Topics
- Using Asset Calendars: Overview

Enabling Assets List of Values in Activities

You can expose the Asset list in the Activities pages for salespeople to associate an asset with appointments, tasks, and call reports. By default, the Asset list does not appear in the Activities pages.

To enable the Asset list in the Activities pages:

1. Sign in as the sales administrator or as a setup user.
2. Create and activate a sandbox.
3. Click `Navigator > Configuration > Application Composer`.
4. In the Objects navigation tree, select the `Sales` check box, expand Standard Objects, then expand Activity.
5. Click the `Pages` node.
6. Ensure that the Simplified Pages tab is selected.
7. Find the section you want to add the Asset list to. For example, to add the Asset list to the appointment details page, use the Appointment Details section in the Details Page Layouts region.
Within that section, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.

Type a new layout name and click **Save and Edit**.

The Details Layout page appears.

Click the edit icon to edit the Summary region.

The Details Layout: Edit Summary page appears.

In the Configure Detail Form section, move the **Asset** field from the **Available Fields** box to the **Selected Fields** box.

Click **Save and Close**.

On the Details Layout page, click **Done**.

Ensure that the layout status for your new layout is **Active**.

Test the changes: Navigate to **Sales > Activities** as a user with access to the Activities pages, for example, as a salesperson. Edit an appointment and ensure you can see the Asset list in the Edit Appointment page.

Publish the sandbox.
13 Setting Up Products

Sales Products: Overview

Create and edit sales products that you can then use in your catalog. The sales catalog is the source for product groups and products in leads, opportunities, contracts, and service requests. Revenue entered for product groups and products drives metrics for sales forecasting and salesperson quota.

Sales Products Tasks

As the sales administrator, you can perform the following tasks with sales products:

- Create products, view products, and edit products and have them automatically updated in the back-end product model.
- Add images and attachments to products
- Add products to your sales catalog
- Mark products as usable in service requests and customer self-service applications
- Import products and create and update products using Oracle file-based import
- Create and update products using REST or SOAP web services

For more information about importing products, see the Getting Started With Your Implementation guide and the file-based data import for sales guide. For more information about REST and SOAP web services support for products, see the REST API and SOAP web services guides.

Integration With Other Oracle Applications

You can integrate sales products with other applications to provide additional functionality. The following table provides an overview of sales products integrations with other applications.

<table>
<thead>
<tr>
<th>Functionality</th>
<th>Application</th>
<th>Where to Find More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales product changes are automatically updated in the product model</td>
<td>Oracle Supply Chain Management (SCM) Cloud</td>
<td>• Oracle SCM Cloud Implementing Product Management guide&lt;br&gt;• Oracle SCM Cloud Using Product Master Data Management guide&lt;br&gt;• Setting Up Products chapter in the Implementing Sales guide</td>
</tr>
<tr>
<td>Use products in the sales catalog</td>
<td>Sales Catalog</td>
<td>• Setting Up Sales Catalogs chapter in the Implementing Sales guide&lt;br&gt;• Managing Opportunity Products and Revenue chapter in the Using Sales guide</td>
</tr>
<tr>
<td>Use products in leads</td>
<td>Leads</td>
<td>• Setting Up Leads chapter in the Implementing Sales guide</td>
</tr>
</tbody>
</table>
Initial Tasks for Sales Products

Getting Started With Sales Products

To get started with sales products, familiarize yourself with the implementation steps and concepts described in this topic.

Implementation Steps for Sales Products

The following table provides the high-level implementation steps for sales products, indicates whether each step is required or optional, and lists where to find more information about each step.

<table>
<thead>
<tr>
<th>Step</th>
<th>Optional or Required</th>
<th>Description</th>
<th>Where to Find More Information</th>
</tr>
</thead>
</table>
| Set up an item master organization and a location | Required             | The item master organization contains definitions of items that you can use across one or more item and inventory organizations. | • Getting Started With Your Implementation guide, in the sales catalog setup chapter  
• Prerequisite Setups for Sales Products topic                                                                                     |
| Set up units of measures (UOMs)           | Required             | Units of measure (UOMs) are standard definitions for product measurements; therefore, you must set up UOMs. | Prerequisite Setups for Sales Products topic                                                                                                         |
| Specify item master organization          | Required             | You must set the profile option, Sales Products Item Organization, to the item master organization the sales products are defined in. | The following topics:  
• Setting Sales Products Item Master Profile Option: Procedure                                                                                     |
### Setting Up Products

<table>
<thead>
<tr>
<th>Step</th>
<th>Optional or Required</th>
<th>Description</th>
<th>Where to Find More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create and edit products</td>
<td>Required</td>
<td>Use the <strong>Sales &gt; Products</strong> UI to create and edit the products you sell. Or, use file-based import to import products.</td>
<td>• Item Master Organization: Explained</td>
</tr>
<tr>
<td>Set sellable attribute on products</td>
<td>Required</td>
<td>When creating products in sales, you must mark the Eligible to Sell attribute in order for consuming sales applications to display the product.</td>
<td>The section in this topic, Eligible to Sell Attribute</td>
</tr>
</tbody>
</table>
| Set serviceable and self-service attributes on products      | Optional             | While creating or editing products, set two attributes that specify whether products can be used in the service request application and in consuming customer self-service applications. | • The section in this topic, Service Attributes  
• Oracle Engagement Cloud Implementing Service Request Management guide |
| Enhance product display with attachments and images          | Optional             | Enhance the look and feel of your products in the catalog with attachments and images. | • The section in this topic, Attachments, URLs, and Images  
• The topic, Working with Sales Products: Procedures |
| Add products to the sales catalog                            | Conditionally required | Add your sales products to the sales catalog hierarchy in order to make them available in opportunities, leads, and contracts. | The topic, Adding Products to the Catalog: Procedure |
| Set up eligibility rules for products                        | Optional             | Implement eligibility rules that enable salespeople to check product eligibility in opportunities. | The topic, Sales Product Eligibility: Explained |
| Run a scheduled process to make SCM Cloud Product Model items available in sales | Conditionally required | Products created in the sales products area can be seen in the Oracle Supply Chain Management (SCM) Cloud Product Model, but items created in the Product Model cannot be seen in sales, unless you run the scheduled process, Import Sales Products from PIM Data Hub. | The section in this topic, Making Products Created in Product Model Available in Sales |
| Modify the list of values for the Product Type lookup type   | Optional             | You can modify the list of product types that display in the sales UI. Sales products retrieve the list of values. | The topic, Lookup Types: Explained |
Understand how sales products and the SCM Cloud Product Model fit together

Optional

When you create or update product information in sales, the product information is automatically updated in the SCM Cloud Product Model.

Keep in mind that certain attributes in products are named differently and map to different attributes in the SCM Cloud Product Model. For example, in products, the Number field maps to the Item field in the SCM Cloud Items UI. Similarly, the Name field in products maps to the Description field in the SCM Cloud Items UI.

The following topics:
- Sales Products and SCM Cloud Products: How They Work Together
- Working with Sales Products: Procedures

The following guides:
- Oracle SCM Cloud Implementing Product Management
- Oracle SCM Cloud Using Product Master Data Management

Understand supported item life cycle phases and item classes for sales products

Optional

Keep in mind that sales products support only:
- Production life cycle phase
- Root item class

The following sections in this topic:
- Default Product Life Cycle
- Root Item Class

The topic, Lifecycle Phases: Explained

Understand how the sales products business logic interacts with the Oracle SCM Cloud Product Model

Optional

products data follows specific business logic that relates to the Oracle SCM Product Model.

The topic, Sales Products Business Object Logic: Explained

Display additional details about products using extensible flexfields in the Product Model

Optional

After you set up extensible flexfields and add more details to products, salespeople can browse the catalog and drill down further to view more details about the products. This setup requires a license to Oracle SCM Product Hub.

The article, Extensible Flexfield Data Configuration for Product Information Management (Doc ID 2091164.1), available on My Oracle Support (support.oracle.com).

Eligible to Sell Attribute

The Eligible to Sell attribute marks a product as available in the consuming sales applications. You enable or disable this attribute in the edit product pages. It can also be updated using web services or file-based data import. This attribute interacts with the SCM Cloud item attributes Customer Orders Enabled and Orderable on the Web. Keep in mind the following points about the attribute:

- All sales products must have the check box checked to be visible in consuming sales applications.
• If the check box is unchecked, then the SCM Cloud item attributes Customer Orders Enabled and Orderable on the Web are set to no.

• If the check box is checked, then the SCM Cloud item attribute Customer Orders Enabled is set to yes.

**Note:** Keep in mind that after you create a product using the simplified products UI, you cannot delete it from within . To "hide" products in consuming applications, deselect the Eligible to Sell indicator in the product details screen. You can delete products in the Product Model, and then after you run the scheduled process, Import Sales Products from PIM Data Hub, the products are removed from . To understand how to delete products in the Product Model, see the Using Product Master Data Management guide.

### Service Attributes

Two attributes specify whether sales products are serviceable and enabled for self-service by your customers: Eligible for Service and Enable Customer Self-Service. The attributes are described in the sections that follow.

#### Serviceable Attribute

The Eligible for Service attribute makes a product available in the Oracle Engagement Cloud Service Request Management application. You enable or disable this attribute in the edit product pages. It can also be updated using web services or file-based data import. This attribute interacts with the SCM Cloud item attribute Service Request. Keep in mind the following points about the attribute:

- All serviceable products must have the check box checked to be visible in the service request application.
- If the check box is checked in the sales product pages, then the Service Request indicator in SCM Cloud is enabled.
- If the check box is unchecked after being checked in the sales products pages, then the corresponding SCM Cloud item attribute Service Request is set to null.
- If, in SCM Cloud, the Service Request attribute is disabled, inactive, or null, then the application clears the Eligible for Service check box in the sales products pages.

#### Customer Self-Service Attribute

The Enable for Customer Self-Service attribute makes a product available in consuming self-service customer applications, such as Oracle Digital Customer Service, part of Oracle Engagement Cloud. You enable or disable this attribute in the edit product pages. You can also update it when adding a product to the catalog. Furthermore, it can also be updated using web services or file-based data import. This attribute interacts with the SCM Cloud Item attribute Enabled for Customer Self-Service.

### Service and Self-Service Attributes Examples

**Example 1:** A company that sells electronics has externally-exposed products, such as televisions, appliances, video games, and so on, that are eligible to be serviced. Internally, the company tracks products that go into making these external products, such as cables or peripherals. In this scenario, the company marks all externally-exposed products that can be serviced with Enable Customer Self-Service indicator as yes, while all of the internal products (for example, cables and peripherals) that are not self-service-enabled, with the indicator as no.

**Example 2:** Using a self-service application, a customer requests service on all current models. In this case, these models would be eligible-for-service enabled and customer self-service enabled. However, if the customer wants service on, for example, an older model, then he calls a service agent and the service agent can request service on the old model. In this case, the old model would be eligible-for-service enabled, but customer self-service would be disabled.
Attachments, URLs, and Images
You can associate both attachments (which can be files or URLs) and images with products. Note the following:

- Only one image can be associated with a product. All file types supported by the content storage application, Oracle WebCenter Content, are supported.
- Multiple attachments (files) or URLs can be associated with a product.

Default Product Life Cycle
Sales products functionality supports a single product life cycle, called Production. If this default life cycle meets your business requirements, no implementation steps are required around product life cycle.

Root Item Class
By default, sales products functionality uses the supplied Root item class to classify products. Additional classifications are only available if you license the product hub.

Making Products Created in Product Model Available in Sales
Products created in can be seen in the Product Model, but items created in the Product Model cannot be seen in unless you run the scheduled process, Import Sales Products from PIM Data Hub. You run the process as the sales administrator in the Scheduled Processes pages in Setup and Maintenance work area.

Related Topics
- Item Master Organization: Explained

Prerequisite Setups for Sales Products
Before you set up and use sales applications, ensure that your implementation has completed the prerequisite setups discussed in this topic.

Ensure Setup of Enterprise Structure
Sales products functionality relies on the item master organization, the organization that holds the definitions of all products your company plans to sell. Therefore, you must set up a location and then an item master organization. You can find basic setups in the Getting Started With Your Implementation guide, in the sales catalog setup chapter.

For more information, see the related topics and these guides:
- Getting Started With Your Implementation
- Oracle Applications Cloud Understanding Enterprise Structures
- Oracle SCM Cloud Implementing Product Management
- Oracle SCM Cloud Using Product Master Data Management

Ensure Setup of Units of Measure
Units of measure (UOMs) are standard definitions for product measurements; therefore, you must set up UOMs. If UOMs are already set up as part of your company’s existing setups, then you can skip this step.

Setting up UOMs involves creating the larger UOM classes (or categories), as well as the UOMs themselves. For example:

- If you’re selling consulting services where you charge by the hour and minute, then you set up Time as the UOM class and Hour and Minute as UOMs.
• If you’re selling goods that are priced by the box and by the unit, you set up Quantity as the UOM class and Box and Each as the UOMs.

• If you’re selling and pricing goods by the meter, then you set up Dimension as the UOM class and Meter as the UOM.

**Note:** Each class can have only one base UOM. Base UOMs should generally be the smallest UOM in the class.

To set up UOM classes and the UOMs themselves:

1. Sign in as the sales administrator.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Sales Catalog and Products
   - Task: Manage Units of Measure
3. If the class for the unit of measure you are creating, does not exist, then:
   a. Click **Manage UOM Classes**.
      The Manage UOM Classes page appears.
   b. Click the add icon in the search results.
   c. Enter the class name and optional description. For example, for quantity, enter **Quantity** as the **Class**.
   d. Enter the smallest unit you are selling for the class as the **Base UOM** and optional description. For example, for Quantity, enter **Each**.
   e. Click **Save and Close**.
4. In the Manage Units of Measure page, click **Add** in the search results area.
5. Enter the name of the UOM and an optional description. For example, enter **Each**.
6. Select a class from the Class list.

**Note:** You can ignore the rest of the fields and buttons on the page because they are either not required or not used by sales applications.

7. Click **Save and Close**.

**Tip:** When disabling UOMs, disable the conversions first, then the UOM. If the UOM you’re disabling is a base unit, the class should be disabled also. After an item has been defined in the item master, then the primary UOM for that item cannot be modified.

**Related Topics**

• *Item Master Organization: Explained*

• *Item Organizations: Explained*

• *Units of Measure, Unit of Measure Classes, and Base Units of Measure: How They Fit Together*

• *Assigning Base Units of Measure to Unit of Measure Classes: Examples*
Setting Sales Products Item Master Profile Option: Procedure

Sales product functionality relies on a single item master organization. All products (items) are created within this item master organization. The item master organization contains definitions of items that you can use across one or more item and inventory organizations. For determining item master organization, sales products uses the value defined in the profile option, Sales Products Item Organization (QSC_SALES_PRODUCTS_INVENTORY_ORG_ID).

For more information on setting up inventory organizations and the item master, see the Oracle Applications Cloud topics on defining enterprise structures.

Setting Sales Products Item Organization Profile Option

Use the following procedure to set the Sales Products Item Organization profile option.

1. Sign in as the sales administrator.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values
3. In the Manage Administrator Profile Values page, in the Profile Option Display Name field, enter Sales Products Item Organization.
4. Click Search.
5. Click the name of the profile option in the search results.
6. In the Profile Value field, select the organization that serves as the item master for products.
7. Save your changes.

Related Topics

- Item Master Organization: Explained

Working with Sales Products: Procedures

Use the procedures in this topic as you create and maintain sales products.

This topic covers the following tasks:

- Viewing a list of sales products: This task includes basic and advanced search and creating saved searches.
- Creating products: This task includes entering product basic information.
- Editing products: This task includes modifying some product basic information (including setting sellable and serviceable attributes) and adding or editing attachments, URLs, and images.

After you create products, you can use them in your sales catalog. See the topic, Adding Products to the Catalog: Procedure, for more information.

Viewing a List of Products

To view a list of products, sign in as the sales administrator and navigate to Sales > Products. The default saved search is for products updated by you in the last week.
In the overview page, you can:

- Search for products using the **Find** text box. For more information, see the topics on using search in the applications.
- View products updated by you in the last week. Keep in mind that if no products have been updated in the past week, then the list will be blank.
- Use advanced search to modify and execute the supplied saved search.
- Create additional saved searches.
- Access product details.

**Creating Products**

Creating a product includes entering product basic information and saving the product for the first time. Keep in mind that after you create a product using the simplified products UI, you cannot delete it. To “hide” products in consuming applications, deselect the Eligible to Sell option in the product details screen.

Use the following procedure to create a new sales product.

1. Sign in as the sales administrator and navigate to **Sales > Products**.
   
The Products overview page appears.
2. Click the **Create Product** button.
   
The Create Product page appears.
3. Fill out the fields. The following table shows the fields, their descriptions, and the table columns in SCM products that they map to.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>SCM Products Table Column Mapping</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Number</td>
<td>Enter a unique product number. You cannot edit this field after you save the product.</td>
<td>Item</td>
</tr>
<tr>
<td>Name</td>
<td>Enter the name of the product whose number you entered.</td>
<td>Description</td>
</tr>
<tr>
<td>Description</td>
<td>Optionally, enter a description for the product.</td>
<td>Long Description</td>
</tr>
<tr>
<td>Sales Product Type</td>
<td>Optionally, further categorize the product by selecting a product type. Sales products retrieve the list of values for Product Type from the lookup type QSC_.SALES_.PRODUCT_TYPE.</td>
<td>Sales Product Type</td>
</tr>
<tr>
<td>Default UOM</td>
<td>Select the default unit of measure for the product. You cannot edit this field after you save the product.</td>
<td>Primary Unit of Measure</td>
</tr>
<tr>
<td>Eligible to Sell</td>
<td>Ensure that this option is selected. This attribute marks a product as available in the consuming sales applications. If this option is not selected, the product will not appear in the consuming sales applications.</td>
<td>Customer Orders Enabled</td>
</tr>
</tbody>
</table>
Setting Up Products

4. Save your changes.

Note: In the create and edit product pages, if the Sales Product Type selected is one of the following, then the Eligible for Service check box is cleared and disabled: Extended Warranty, Included Warranty, Preventive Maintenance, Service Level Agreement, Software Maintenance.

### Editing Product Details

Editing products can include modifying product basic information and adding or updating attachments, URLs, and images.

Use the following procedure to edit product details:

1. Sign in as the sales administrator and navigate to Sales > Products.

   The list of products appears.

2. Select a product from the list. The table shows the editable fields, their descriptions, and the table columns in SCM products that they map to.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>SCM Products Table Column Mapping</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eligible for Service</td>
<td>Optionally, if integrating with the Oracle Engagement Cloud service request application, enable this option. Only products with this option set can be used in the service request application.</td>
<td>Service Request</td>
</tr>
<tr>
<td>Enable Customer Self-Service</td>
<td>Optionally, if integrating with Oracle Digital Customer Service, part of Oracle Engagement Cloud, or another third-party customer self-service application, enable this option. Only products with this option set can be used in customer self-service applications.</td>
<td>Enable Customer Self-Service</td>
</tr>
</tbody>
</table>

### Field Details

- **Name**: Enter the name of the product whose number you entered.
- **Description**: Optionally, enter a description for the product.
- **Sales Product Type**: Optionally, further categorize the product by selecting a product type. Sales products retrieve the list of values for Product Type from the lookup type QSC_SALES_PRODUCT_TYPE.
- **Eligible to Sell**: Ensure that this option is selected. This attribute marks a product as available in the consuming sales applications. If this option is not selected, the product will not appear in the consuming sales applications.
- **Eligible for Service**: Optionally, if integrating with the Oracle Engagement Cloud service request
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>SCM Products Table Column Mapping</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Customer Self-Service</td>
<td>Optionally, if integrating with Oracle Digital Customer Service, part of Oracle Engagement Cloud, or another third-party customer self-service application, enable this option. Only products with this option set can be used in customer self-service applications.</td>
<td>Enable Customer Self-Service</td>
</tr>
</tbody>
</table>

3. Attachments: Add or remove attachments or URLs as needed. Multiple attachments or URLs can be associated with a product.

4. Images: Add or remove images as needed. Only one image can be associated with a product. All file types supported by Oracle WebCenter Content are supported.

5. When done editing, save your changes.

**Related Topics**
- Adding Products to the Catalog: Procedure

**Setting Up Product Eligibility: Explained**

Product eligibility lets salespeople check whether products they have added to opportunities are eligible to sell based on rules that you set up. For example, you sell software, and government regulations prevent you from selling certain types of software to certain countries. You implement rules to prevent the sale of these products to any customers with locations in these countries. Salespeople can click the Check Eligibility button in the opportunity Products table to check whether the products are eligible to sell.

**Setup Overview**

You must perform several steps to enable eligibility in opportunities, as described in this topic.

Prerequisite: Before you can implement product eligibility, you must have created a sales catalog and added products to it.

The following are the high-level setup steps:

1. Set up eligibility rules in the catalog.
2. Set the eligibility check to run.
3. Enable the Check Eligibility button on the Products table in opportunities.

Keep in mind that eligibility functionality is only available for individual products. You cannot implement eligibility rules for product groups. Also, eligibility checks can only be performed in opportunities.

**Creating Eligibility Rules**

You set up eligibility rules in the product group pages in Setup and Maintenance. Use the following procedure.

1. Sign in as the sales administrator.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
Functional Area: Sales Foundation
Task: Manage Product Groups

3. In the Manage Product Groups page, select the product group that has the products in it, for which you’re setting up eligibility rules.
4. Lock the product group to modify it.
5. Select the product for which you’re setting up eligibility rules.

The Eligibility table appears on the page.

6. In the Eligibility table, for each rule, set the following options. You may need to first add a row to the table.
   - **Rule Type**: Set the product as available. To disable eligibility for the product set the product as unavailable.
   - **Country**: Select a country for which the Available and Unavailable actions apply.
   - **Dates**: Select the dates for the eligibility rule.

7. Click **Publish**.
8. Unlock the product group.
9. Click **Save and Close**.

### Setting Eligibility Check to Run

Set the eligibility check to run using the product group usage pages in Setup and Maintenance. Use the following procedure.

1. Sign in as the sales administrator.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Product Group Usage
3. In the Manage Product Group Usage page, select the Base catalog in the upper portion of the page. (If your catalog uses a different usage, then select it.)
4. Click the **Functions** tab in the Details section of the page.
5. For the **Eligibility engine** option, click the **Value** drop-down list and set the value to **Run**.
6. Click **Save and Close**.

### Enabling the Check Eligibility Button

You use Application Composer to enable the Check Eligibility button on the opportunity Products table. Use the following procedure.

> **Note**: When modifying the UI, you must make your changes in a sandbox. See the Extending Sales guide for more information about using sandboxes.

1. Sign in to the application as the sales administrator or a setup user.
2. Ensure that you are working in an active sandbox.
3. Click **Navigator > Configuration > Application Composer**.
4. In the navigation tree, expand **Standard Objects**.
5. Expand the **Opportunity** object and then click **Pages**.
6. In the Opportunity: Pages page, ensure that the **Simplified Pages** tab is active.
7. In the Details Page Layouts region, select the **Standard Layout** in the table and then click the **Duplicate** icon. The Duplicate Layout dialog box appears.
8. Enter a name for the new layout and click **Save and Edit**. You are returned to the edit page for the new layout.

9. In the Edit Revenue Table region, click the edit icon.

10. In the Edit Revenue Table page, find the **Check Eligibility** button in the Buttons and Actions window. Move the field from the Available Buttons window to the Selected Buttons window.

11. Click **Save and Close**.

12. Click **Done**.

13. Validate the change by navigating to the edit opportunity page and ensuring that you can see the **Check Eligibility** button on the Products table.

   Note that the user you sign in with to validate the change must belong to a sales resource organization. For example, you must sign in as a sales representative.

14. Publish the sandbox according to your company’s process.

15. The **Check Eligibility** button is now available to sales users on the opportunity Products table.

Related Topics
- Creating the Sales Catalog: Getting Started
- Catalog Usages: Overview
- Configuring Catalog Usages: Explained

Implementation Concepts for Sales Products

Sales Products and SCM Cloud Products: How They Work Together

When you create or update product information in sales Products area, the product information is automatically updated in the back-end application, Oracle Supply Chain Management (SCM) Cloud.

The following table shows the mapping between sales product attributes and SCM Cloud item attributes.

<table>
<thead>
<tr>
<th>Sales Product Attribute</th>
<th>SCM Cloud Products Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inventory Item ID</td>
<td>Item</td>
</tr>
<tr>
<td>Organization ID</td>
<td>Organization</td>
</tr>
<tr>
<td>Number</td>
<td>Item (in SCM Cloud Items UI header region)</td>
</tr>
<tr>
<td>Name</td>
<td>Description (in SCM Cloud Items UI header region)</td>
</tr>
<tr>
<td>Description</td>
<td>Long Description (in SCM Cloud Items UI Overview tab)</td>
</tr>
<tr>
<td>Product Type</td>
<td>Sales Product Type (in SCM Cloud Items UI Specifications tab and Sales and Order Management side navigation region)</td>
</tr>
</tbody>
</table>
### Sales Products Business Object Logic: Explained

Sales product data follows specific business logic. For example, if you create a product in the sales products interface or using web services, the Inventory Item ID is null. However, if you create a product using file-based data import, the Inventory Item ID is the same as the Inventory Item ID in the Oracle Supply Chain Management (SCM) Cloud product tables.

The following table shows the business logic for various business objects when using sales products. In the table "sales product" means a product created in the sales products UI. "Import" refers to the Oracle file-based data import feature.

<table>
<thead>
<tr>
<th>Sales Products Attribute</th>
<th>Business Logic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inventory Item ID</td>
<td>• Sales product creation through UI or web services: null.</td>
</tr>
<tr>
<td></td>
<td>• Sales product creation through import: Same as the Inventory Item ID for the SCM back-end item that is being created as the sales product. The SCM back-end item attribute should match the sales product Number attribute.</td>
</tr>
<tr>
<td></td>
<td>• Required when a product is updated.</td>
</tr>
<tr>
<td>Organization ID</td>
<td>• Sales product creation through UI or web services: The value for the profile option QSC_SALES_PRODUCTS_INVENTORY_ORG_ID is set as the default.</td>
</tr>
<tr>
<td></td>
<td>• Sales product creation through import: Same as the organization ID for the SCM Cloud back-end item that is being created in Sales products screens.</td>
</tr>
<tr>
<td>Item Master Organization</td>
<td>• Sales product creation through UI or web services: The value for the profile option QSC_SALES_PRODUCTS_INVENTORY_ORG_ID is set as the default.</td>
</tr>
<tr>
<td></td>
<td>• Sales product creation through import: Same as the organization ID for the SCM Cloud back-end item that is being created in Sales products screens.</td>
</tr>
<tr>
<td>Item Class</td>
<td>• Required attribute when creating a new product in the SCM Cloud back-end products application.</td>
</tr>
<tr>
<td></td>
<td>• The value should be <a href="#">Root Item Class</a>.</td>
</tr>
<tr>
<td>Template</td>
<td>• Required attribute when creating a new product in the SCM Cloud back-end products application.</td>
</tr>
<tr>
<td>Sales Products Attribute</td>
<td>Business Logic</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Sales Products Attribute</strong></td>
<td><strong>Business Logic</strong></td>
</tr>
<tr>
<td></td>
<td>• The value should be <strong>Finished Goods</strong>.</td>
</tr>
</tbody>
</table>
| **Number**                       | • Required attribute when creating a new product or updating an existing product.  
• The value must be unique for an item master.  
• Creating a product with an existing number throws an API unique violation error.                       |
| **Name**                         | • Required attribute when creating a new product.                                                                                                                 |
|                                  | • The value should be passed during product update only if changed.                                                                                                 |
| **Product Type**                 | **Sales products retrieves the list of values for Product Type from the lookup type QSC_SALES_PRODUCT_TYPE.**                                                      |
| **Default Unit of Measure (UOM)**| • Validated against all UOMs that are effective as of current date.  
• Optional for create operation.  
• Update of UOM is not allowed for saved products.                                                                 |
| **Eligible to Sell**             | • All Sales products must have this indicator set to yes (checked).                                                                                               |
|                                  | • For update operation, pass only if changed.                                                                                                                     |
|                                  | • When a user sets it to no from yes, the corresponding SCM Cloud item indicators Customer Orders Enabled and Orderable on the Web are set to no. |
|                                  | • When a user sets it to yes from no, only the corresponding SCM Cloud item indicator Customer Order Enabled is set back to yes.                                |
| **Eligible for Service**         | • All Service products that will be used in the service request management application must have this indicator set to yes (checked). |
|                                  | • For update operation, pass only if changed.                                                                                                                     |
|                                  | • When a user sets it to no from yes, the corresponding SCM Cloud item indicator Service Request is set to Disabled |
|                                  | • When a user sets it to yes from no, the corresponding SCM Cloud item indicator Service Request is set to Enabled                                                |
| **Image**                        | • Image maps to the SCM Cloud attachment entity ITEM_ENTITY and the category IMAGE.  
• Only one image per product is allowed.  
• Optional for create operation. For update operation, pass only if changed.  
• In the case of errors, API messages are returned.                                                                 |
| **Attachments**                  | • A product can have multiple attachments.  
• Only attachments of type “file” are allowed.  
• Product attachments map to the SCM Cloud items attachment entity ITEM_ENTITY.  
• The attachment category can be one of the following:  
• One of the attachment categories associated with the Root Item Class except IMAGE.  
• Null  
• Optional during product creation.  
• Attachments can be added, updated, or deleted at any time.  
• In the case of errors, SCM Cloud API messages are returned.                                                                 |
14 Setting Up Sales Catalogs

Sales Catalogs: Overview

Using sales catalogs lets you:

- Use product group as a territory dimension so that assignments can be made based on product.
- Give salespeople a mechanism to add product revenue to opportunities.
- Allow salespeople to add products to leads.
- Have product revenue available in forecasting and salesperson quota.

**Note:** While you can include individual products (also known as inventory items) in your catalog, they're not required unless you’re integrating with a product application downstream, such as Oracle Configure, Price and Quote (CPQ) Cloud. For information on the setup of individual products, see the topics on sales products.

To get started creating your sales catalog, see the topic, Creating the Sales Catalog: Getting Started.

Sales Catalog Key Features

The following are the main features of the sales catalog:

- Quickly build and deploy sales catalogs in a single administration UI.
- Catalog administration tool allows you to build product groups in a hierarchy.
- Product group display name and description can be translated into different languages.
- Use file-based import to import product groups rather than having to enter them in the UI.
- Use the sales products UI to create individual products that you then can add to the product group hierarchy.

Product Group Hierarchy Example

The following figure shows an example of a product group hierarchy.

In the example:

- At the top of the product group hierarchy is the root product group, named Special Deals.
- The nested groups begin with the child groups of the Special Deals root group. These include: Men, Women, and Kids.
- Within the Kids group, more nested groups appear, including Girls and Boys.
- Within the Girls group, a child group called Apparel appears.
- Within the Apparel group, further nesting occurs, with the groups Pants, T-shirts, and Dresses.
Together, the root group and configuration of parent and child groups make up the sample hierarchy.

![Sample Hierarchy Diagram]

**Initial Tasks for Sales Catalogs**

**Creating the Sales Catalog: Getting Started**

Sales catalogs organize the products and services that you sell in a hierarchy of product groups. Your salespeople select product groups from the sales catalog when they create leads and opportunities, so you must create at least one sales catalog. You can also use the product groups as a dimension for defining sales territories and for preparing management reports.

**High-Level Setup Steps**

You must perform several steps to set up the sales catalog. The following table shows the high-level setup steps and where to find more information about the step.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Where to Find More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create the root product group.</td>
<td>Create the root product group. The root catalog or root product group is the top of the product group hierarchy. All other product groups are nested underneath. Perform this step in the product groups pages in Setup and Maintenance.</td>
<td>Creating the Root Product Group section in this topic</td>
</tr>
<tr>
<td>Step</td>
<td>Description</td>
<td>Where to Find More Information</td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
<td>--------------------------------</td>
</tr>
</tbody>
</table>
| Create the product group hierarchy. | Add additional product groups to create the catalog hierarchy of product groups and subgroups. You can add the product groups manually in the product groups pages in Setup and Maintenance, or you can import them from a file. | • Creating the Product Group Hierarchy section in this topic  
• The topic, Importing Products and Product Groups in the Getting Started with Your Sales Implementation guide  
• The Importing Product Groups chapter of the Understanding File-Based Data Import and Export guide |
| Publish the sales catalog. | Publish the product group hierarchy that makes up the sales catalog. Perform this step in the product groups pages in Setup and Maintenance. When you publish a catalog, the scheduled process, Refresh Denormalized Product Catalog Table for BI, runs automatically to update the current view of the product group hierarchy in consuming applications. | • Publishing the Sales Catalog section in this topic  
• Running Refresh Denormalized Product Catalog Table topic |
| Set the catalog’s usage to Base. | To enable a sales catalog for use in the applications, you associate it with a “usage” called the Base usage. Perform this step in the product groups pages in Setup and Maintenance. Each time you make a new assignment of Base to a root product group, you must run the scheduled process, Refresh Denormalized Product Catalog Table for BI. If you do not run the process, your product group hierarchy may not appear in the consuming applications. | • Enabling the Sales Catalog topic  
• Running Refresh Denormalized Product Catalog Table topic |
| Set the browse catalog profile option. | Set the profile option, Browse Sales Catalog in Opportunities Enabled, to Yes to enable Browse Sales Catalog button on the Products table in the simplified UI. Perform this step in the Manage Opportunity Profile Options task in Setup and Maintenance. | Enabling the Sales Catalog topic |
| Set usage options for searching and browsing. | If you have set up the browse catalog feature, configure search and browse options. | Setting Options for Sales Catalog Searching and Browsing topic |
| Verify your setups. | After you have published and enabled your catalog, you will want to validate that the product groups are appearing in leads and opportunities. | Validating the Sales Catalog topic |
| Create products (items). | Optionally, set up products to be able to use products in your sales catalog. You can use either the sales products UI or the | If using the sales products UI:  
• Setting Up Sales Products chapter in the Implementing Sales guide |
### Creating the Root Product Group
The root product group is the top-level product group in your catalog. The display name you use appears in the UI for users.

Use the following procedure to create the root product group.

1. Sign in as a setup user or as the sales administrator.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Sales Catalog
   - Task: Manage Product Groups
3. In the Manage Product Groups page, click the create icon.
4. In the **Name** field, enter a unique name without spaces. This is the internal name of the group.
5. In the **Display** field, enter the product group display name. This is the name that displays in the UI to users.
6. Optionally, enter a description.
7. Optionally, enter the effective start and end dates.

### Step Description
<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Where to Find More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Sign in as a setup user or as the sales administrator.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>In Setup and Maintenance, go to the following:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Offering: Sales</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Functional Area: Sales Catalog</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Task: Manage Product Groups</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>In the Manage Product Groups page, click the create icon.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>In the <strong>Name</strong> field, enter a unique name without spaces. This is the internal name of the group.</td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td>In the <strong>Display</strong> field, enter the product group display name. This is the name that displays in the UI to users.</td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td>Optionally, enter a description.</td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td>Optionally, enter the effective start and end dates.</td>
<td></td>
</tr>
</tbody>
</table>
8. Select the following check boxes:

   - **Active**: Only active product groups are available for use in the consuming applications.
   - **Root Catalog**: The root catalog is the top product group in the hierarchy. All other product groups created under it are considered subgroups. You can only add root catalogs to the Base usage in the Manage Product Group Usage page. Adding your catalog to the Base usage is a required step to enable the catalog for use in consuming applications.
   - **Locked**: This check box may already be checked. A product group must be "locked" to be edited.

9. Deselect the **Allow Duplicate Children** check box. This setting ensures that product groups and products do not appear multiple times in the hierarchy.

10. Optionally, deselect the **Allow Selection** check box. This setting ensures that product groups do not appear in the runtime UI.

11. Click **Save and Close**.

12. Verify that the root product group appears in the Manage Product Groups pane.

**Creating the Product Group Hierarchy**

If you are manually creating the product group hierarchy in the UI, create the remaining product groups under the root product, using the following steps:

1. Click the root product group in the side pane.

When viewing product groups in the Manage Product Groups page, you have two view options:

   - **List view**: When you first enter the Manage Product Groups page, the product groups are shown as a list of folders. Click the tree view icon to enter tree view.
   - **Tree view**: Tree view shows the product groups as nested parent-child groups. To return to list view, click the list view icon. In order to see the list view icon and the list of product groups, you may need to expand the Manage Product Groups pane.

The following figure shows the list view and tree view icons on the Manage Product Groups page.

2. In the Manage Product Groups page, click the **Subgroups** tab in the main work area.

   The product group information for the selected group appears in the main work area.
Tip: A product group must be "locked" to be edited, so ensure that the parent of the product group you are creating is locked.

3. Click the Create icon.
4. In the Create Subgroup dialog box, enter the product group information.
   a. In the Name field, enter a unique name without spaces.
   b. In the Display field, enter the product group display name.
   c. Optionally, enter a description.
   d. Optionally, enter the effective start and end dates.
   e. Select the following check boxes:
      - **Active**: Only active product groups are available for use in the consuming applications.
      - **Root Catalog**: Do not select the Root Catalog check box. You can have only one root catalog.
      - Deselect the Allow Duplicate Children check box. This ensures that product groups and products do not appear multiple times in the hierarchy.
5. Click Save and Close.
6. Verify that the product subgroup is visible in the Manage Product Groups pane. If the new subgroup does not appear, then click View and then Refresh.
7. Repeat the steps to create additional levels in your sales catalog hierarchy.

Publishing the Sales Catalog

After you create your product group hierarchy, use the following steps to publish your sales catalog. You must publish the root group at minimum, to be able to associate it to the Base usage. See the topic, Enabling the Sales Catalog, for more information.

1. Lock the root product group and the remaining groups in your hierarchy that you want to make available to end users.
2. Select the root group and click the Publish button.

   Caution: When you publish a node in the hierarchy, the application attempts to also publish all of the locked product groups. Therefore, if you have product groups in the application that you do not want published, be sure to unlock them so that they do not get published with the root and its subgroups.

3. Click Yes in the Confirm Publish dialog box.
4. Click OK on the confirmation message that is displayed.
5. Click Save and Close.

Enabling the Sales Catalog

After you have created your product group hierarchy in the sales catalog and optionally added individual products (items), you must enable the sales catalog for use in the consuming applications, such as opportunities and leads.

To enable the sales catalog, perform the following steps:

1. Set the Browse Sales Catalog profile option. This optional step enables the display of the browse button in the UI.
2. Associate the catalog with Base usage: This required step makes the catalog visible in the consuming applications.
Set the Browse Sales Catalog Profile Option

Set the profile option, Browse Sales Catalog in Opportunities Enabled to Yes to enable Browse Sales Catalog button on the opportunity Products table in the simplified UI. Use the following steps:

1. Sign in as the sales administrator.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Opportunity Profile Options
3. In the search region, enter **Browse Sales Catalog in Opportunities Enabled** in the **Profile Display Name** field.
4. Click **Search**.
5. In the list that is returned, click on the profile option name link.
6. Set the profile option value to **Y**.
7. Save your changes.

Associate the Root Catalog with Base Usage

To enable a sales catalog for use, you associate it with a "usage" called the Base usage. Use the following steps:

1. Sign in as the sales administrator.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Sales Catalog and Products
   - Task: Manage Product Group Usage
3. In the Manage Product Group Usage page, select the **Base** record.
   
   **Tip:** If a product group is already associated with the Base usage in the Details section in the portion of the screen, then you can remove the product group by selecting it and clicking the **Delete** icon.

4. In the Details section, click the **Select and Add** icon.
5. In the dialog box that appears, search for the root catalog that you just created.
6. Select the record and click **OK**.
7. In the Manage Product Group Usage page, click **Save and Close**.

   **Note:** Each time you make a new assignment of Base to a root product group, you must run the scheduled process, Refresh Denormalized Product Catalog Table for BI. If you do not run the process, your product group hierarchy may not appear in the consuming applications. See the topic, Running Refresh Denormalized Product Catalog Table Process, for more information.

Adding Products to the Catalog: Procedure

After you have created products, you can add them to the product groups that make up the sales catalog hierarchy.

The source for your products can be either products created in the sales Products screens or in the Oracle Supply Chain Management (SCM) Cloud Products screens. For more information on product creation, see the topics about sales products.
Adding Products to the Catalog

Use the following procedure to add products to the sales catalog product group hierarchy.

1. Sign in as a setup user or as the sales administrator.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Sales Catalog and Products
   - Task: Manage Product Groups
3. In the Manage Product Groups page, in the product group hierarchy, select the product group that you want to add products to.
4. Lock the product group for editing by clicking the **Lock** button.
5. Click the **Products** tab for the product group you selected.
6. In the **View** filter, ensure that the Administration view is selected.
7. In the products table, select **Actions > Select and Add**.
   - The Select and Add: Products window appears.
8. Search for and select the product you're adding.
9. Click **Apply** and then **OK** in the select and add window.
   - The application returns to the Manage Product Groups page with the product added to the product group.
10. Click the **Publish** button to publish the product group.
11. Click **Yes** in the Confirm Publish dialog window and then dismiss the confirmation message.
    - The product group is automatically published.
12. Save your changes.

Related Topics

- Sales Products: Overview

Filtering Catalog Display by Territories: Explained

You can configure whether the sales catalog displays only product groups and products within a user’s sales territories, or if it displays all product groups and products defined in the catalog. Furthermore, you can configure whether to have territory filtering off by default, and to let users turn the territory filter on or off.

In the sales catalog runtime UI, the territory filter appears as follows, if enabled:

- While browsing the catalog, users can select the **Filter by Territory** option in the Settings menu. For example, while editing an opportunity, a sales representative clicks **Browse Catalog** on the Products table, which launches the catalog where she can browse product groups and products. In the Settings menu, she enables the **Filter by Territory** option, to have the display of product groups and products limited to only those in her assigned territories.
- While searching for products or product groups, users can select the **Filter by Territory** check box. For example, while editing an opportunity, a sales representative searches in the products or product groups lists in the Product table. In the Select: Products or Product Groups pages, she enables the **Filter by Territory** check box, to have the display of product groups and products limited to only those in her assigned territories.

Setting the Territory Filter

You set the territory filtering options in the product groups setup pages.
Use the following procedure to configure the territory filter.

1. Sign in as the sales administrator.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Sales Catalog and Products
   - Task: Manage Product Group Usage
3. Select the Base catalog in the upper portion of the page. (If your catalog uses a different usage, then select it.)
4. Click the Functions tab in the Details section of the page.
5. Click the Value drop-down list for the Territory engine option. If multiple applications have a Territory engine row, then select the row that has the application you want the filtering to apply to. The applications that can use the territory filtering functionality appear in the Mode column of the Functions tab. For example, click Territory engine for the Opportunity Management application shown in the Mode column.
6. Make your filtering selection, using the information in the following table.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not run</td>
<td>Territory filtering is off. The Filter by Territory check box does not display.</td>
</tr>
<tr>
<td>Enforce territory</td>
<td>Territory filtering is on, but is transparent to the user. The Filter by Territory check box does not display.</td>
</tr>
<tr>
<td>Display choice - checked by default</td>
<td>Territory filtering is on. The territory filter check box is displayed and checked by default. The user can deselect the check box to disable the territory filtering.</td>
</tr>
<tr>
<td>Display choice - unchecked by default</td>
<td>Territory filtering is off. The territory filter check box is displayed and deselected by default. The user can check the check box to enable the territory filtering.</td>
</tr>
</tbody>
</table>

7. Click Save and Close.

Disabling Catalog Product Groups in the UI: Explained

You can hide sales catalog product group hierarchy nodes in the runtime UI if you don’t want users to see or select them. By default, nodes of the product group hierarchy can be seen and selected by users in the product group list of values and in the browse view of the catalog.

After you set the option to hide product group hierarchy nodes in the runtime UI, the UI changes as follows:

- In the opportunity Products table, when a user selects a the list of values to select a product group, product groups do not display.
- In browse catalog view, the product groups display but cannot be selected.

For more information about creating and editing product groups, see the Creating the Sales Catalog: Getting Started topic.

Disabling Group Nodes During Creation or Editing

You can hide a product group and its child product groups from displaying in the runtime UI by deselecting the Allow Selection check box while creating or editing the group in the product groups pages.
Use the following procedure.

1. Sign in as the sales administrator.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Sales Catalog and Products
   - Task: Manage Product Groups
3. If you are creating a product group, click the create icon and fill in the required fields. Be sure to deselect the Allow Selection check box.
4. If you are editing a product group, select the product group and lock it for editing.
5. Deselect the Allow Selection check box.
6. Click Save and Close.

Disabling Groups Nodes

You also can configure the display of product group hierarchy nodes using Enforce product group selection option available in the Miscellaneous tab of the Product Group Usages page.

Use the following procedure.

1. Sign in as the sales administrator.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Sales Catalog and Products
   - Task: Manage Product Group Usage
3. Select the Base catalog in the upper portion of the page. (If your catalog uses a different usage, then select it.)
4. To have the settings apply to a particular product node (or catalog), optionally, in the Product Groups tab, select the product group before making the changes in the other tabs.
5. Click the Miscellaneous tab and modify the Enforce product group selection option.
   - A setting of Yes means that the product groups are disabled in the product selection list of values and in the browse catalog view.
   - A setting of No means that the product groups are not disabled.
6. Click Save and Close.

Validating the Sales Catalog

After you have published and enabled your catalog, you will want to validate that the product groups are appearing in leads and opportunities. Use the following procedure.

1. Sign in as a sales manager or salesperson.
2. Navigate to Sales > Leads and create a lead.
3. In the Create Lead window, click the Primary Product search icon and verify that you can see the product groups in the search utility.
4. Next, navigate to Opportunities and create an opportunity.
5. Search for the opportunity you just created and edit it.
6. In the Products region, click Add.
7. For Type, select Group.
8. In the Product list, verify that your product groups display.
9. In the Products table, click the Browse Sales Catalog button. Ensure that you can browse the catalog. Note that this option is available only if the administrator has enabled it.

Running Refresh Denormalized Product Catalog Table Process

Every time you publish a catalog, the scheduled process, Refresh Denormalized Product Catalog Table for BI, runs automatically to update the current view of the product group hierarchy in consuming applications.

In addition, each time you make a new assignment of Base to a root product group, you must run the process. If you do not run the process, your product group hierarchy may not appear in the consuming applications.

Running the Process

Use the following procedure to run the Refresh Denormalized Product Catalog Table for BI process:

1. Sign in as a setup user and navigate to Scheduled Processes.
3. In the Schedule New Process dialog window, click the down-arrow next to the Name field and click Search.
4. In the Search dialog window, enter %Refresh%, and click Search.
5. Select the Refresh Denormalized Product Catalog Table for BI process in the results that are returned and click Ok.
6. Click Ok again, if needed.
   The Process Details window appears.
7. In the Process Details window, click Submit.

Setting Options for Sales Catalog Searching and Browsing: Explained

The browse catalog feature lets sales users search and browse product groups and products in a hierarchy view. When configuring search and browse, you set the following two options:

- Search Product Groups: Specifies whether the search returns product groups and products, or only products. If you’re using not using products in your catalog, then you must set this option to yes.
- Show Immediate Child Products Only: Specifies which products display in the Products heading in the Browse Catalog window. You can ignore this option if you’re not using products in your catalog.

Search Product Groups Option

In the Browse Catalog window, users enter keywords to search for product groups and products. The Search Product Groups option specifies whether the search should return product groups and products, or only individual products.

The following table illustrates how to use the Search Product Groups option.

<table>
<thead>
<tr>
<th>Description</th>
<th>Settings</th>
<th>Example When Set to Yes</th>
<th>Example When Set to No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Determines whether the search finds product</td>
<td>Yes: Search returns both product groups and application returns all product</td>
<td>Search for the term Green: The application returns all product</td>
<td>Search for the term Green: The application returns only products</td>
</tr>
</tbody>
</table>
### Description

<table>
<thead>
<tr>
<th>Description</th>
<th>Settings</th>
<th>Example When Set to Yes</th>
<th>Example When Set to No</th>
</tr>
</thead>
</table>
| groups and products or only products.  
• Searches names and descriptions.  
• The default setting is no. | products. If you’re using not using products in your catalog, then you must use this setting.  
• No: Search returns products only. | 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). | 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 Option

In the Browse Catalog window, users can browse product groups and products by selecting product groups. The Show Immediate Child Products Only option specifies whether to display only the products immediately within the selected product group, or also to display the products contained within the subgroups of the selected product group.

The following table illustrates how to use the Show Immediate Child Products Only option.

<table>
<thead>
<tr>
<th>Description</th>
<th>Settings</th>
<th>Example When Set to Yes</th>
<th>Example When Set to No</th>
</tr>
</thead>
</table>
| • Determines whether the browse feature shows only products within the selected product group in the catalog, or to also show products within the subgroups of the selected product group.  
• The default setting is yes. | • Yes: Browse shows only the products within the selected product group.  
• No: Browse also shows the products within the subgroups of the selected product group. If you’re not using products in your catalog, only product groups, then this setting has no effect on the browse feature. | The product group Servers has no products within it, but its subgroups, Green Servers and UltraPro Servers, each have several products within them. The user clicks the Servers product group in the catalog browse pane. No products display in the Products section of the display page. | The product group Servers has no products within it, but its subgroups, Green Servers and UltraPro Servers each have several products within them. The user clicks the Servers product group in the catalog browse pane. The products contained within the Green Servers and UltraPro Servers product groups display in the Products section of the display page. |

**Note:** The two usage options discussed in this topic are supported in both the desktop and simplified UIs. For other display options supported only in the desktop UI, see the topic, Configuring Catalog Usages: Explained.

### Understanding Catalog Usage Option Modes

Before you set the usage options discussed here, be aware of the concept of “modes” for the catalog usage options. Each catalog usage option has a corresponding Mode value. The Mode setting lets you specify which application or applications the usage option applies to. If you leave the Mode value blank, then the usage option applies to all applications where the catalog is in use.

### Setting the Search and Browse Options

Use the following procedure to set the sales catalog search and browse options.

1. Sign in as the sales administrator.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Sales Catalog and Products
   - Task: Manage Product Group Usage
3. In the Product Group Usage list, select the Base usage.
4. In the Base: Details region, click the **Miscellaneous** tab.
5. Find the option in the list and set it as needed. For example, set Search Product Groups to Yes for the mode, Opportunity Management.
6. Save your changes.

### Additional Implementation Concepts for Catalogs

#### Catalog Usages: Overview

Each catalog is associated with an attribute called a "usage" that specifies the application areas where it is in use. In the typical implementation, the Base usage is the one that is used in the applications.

Within a usage, you can set various options, as described in the topic, **Configuring Catalog Usages: Explained**.

The following table shows the usages supplied with the applications.

<table>
<thead>
<tr>
<th>Usage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base</td>
<td>Used for the sales applications, such as forecasting, territories, opportunities, and leads.</td>
</tr>
<tr>
<td>Help Desk HCM</td>
<td>Used for Human Capital Management Cloud.</td>
</tr>
<tr>
<td>Loyalty</td>
<td>Used for Loyalty Cloud.</td>
</tr>
<tr>
<td>Opportunity Management Alternate Catalog</td>
<td>Used as an alternate for opportunities, for example for Outlook integration.</td>
</tr>
<tr>
<td>Partner Management</td>
<td>Used for partner management.</td>
</tr>
</tbody>
</table>

#### Configuring Catalog Usages: Explained

Each catalog is associated with an attribute called a "usage" that specifies the application areas where it is in use. In the typical implementation, the Base usage is the one that is used in the applications.

You can find the list of supplied usages in the topic, **Catalog Usages: Overview**.

The options include:

- **Product Groups**: Specify which catalogs the usage includes.
- **Modes**: Create and maintain "modes", which in the catalog are departments within your organization that use a particular product group as their parent catalog. Modes are used in combination their parent product group and further with the usage options you set.
- **Templates**: Select the template that determines how the catalog is displayed for this mode of usage.
- **Functions**: Configure functions, such as whether to run the eligibility rules or enforce territory restrictions.
- **Miscellaneous**: Change miscellaneous catalog display settings, such as button labels or number of items per page.
Usages are maintained in the Manage Product Group Usage page in Setup and Maintenance. Before making changes in the Functions or Miscellaneous tabs, you must first:

1. Select the Base usage in the upper portion of the screen. Or, if you are not using the Base usage, select the usage you are using.
2. Select the product group whose usage you want to modify.
3. Optionally, select the mode to which the changes apply.

Functions

In the Functions tab, you can specify options for eligibility checks, display of prices, and product display filtering by territory. The following table shows the options.

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
<th>Value</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eligibility Engine</td>
<td>Determines whether to display the eligibility of products based on the eligibility rules in place.</td>
<td>Do not run</td>
<td>The eligibility service is off. Users cannot check eligibility of products in the catalog.</td>
</tr>
<tr>
<td></td>
<td>Run</td>
<td>Run</td>
<td>The eligibility service is on. Users can check eligibility of products in the catalog.</td>
</tr>
<tr>
<td>Pricing Engine</td>
<td>Does this work with Price Books? How would you display prices in the catalog?</td>
<td>Do not run</td>
<td>The pricing service is off. Prices do not display in the catalog.</td>
</tr>
<tr>
<td></td>
<td>Complex</td>
<td>Complex</td>
<td>The pricing service is on. The catalog shows prices, such as List Price, Your Price, and Discount Price.</td>
</tr>
<tr>
<td></td>
<td>Simple</td>
<td>Simple</td>
<td>The pricing service shows List Price only.</td>
</tr>
<tr>
<td>Territory Engine</td>
<td>Determines whether to display product groups and products in a territory.</td>
<td>Do not run</td>
<td>Territory filtering is off. The Filter by Territory check box does not display.</td>
</tr>
<tr>
<td></td>
<td>Enforce territory</td>
<td>Enforce territory</td>
<td>Territory filtering is on, but is transparent to the user. The Filter by Territory check box does not display.</td>
</tr>
<tr>
<td>Display user choices</td>
<td>• Checked by default: Territory filtering is on. The territory filter check box is displayed and checked by default. The user can deselect the check box to disable the territory filtering.</td>
<td>Display user choices</td>
<td>• Unchecked by default: Territory filtering is off. The territory filter check box is displayed and</td>
</tr>
</tbody>
</table>
**Miscellaneous Actions**

In the Miscellaneous tab, you can set various catalog display preferences, such as the button labels to display and the number of products to display per page.

The following table shows the display options available.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add item button label</td>
<td>The selected value is shown next to the product at runtime.</td>
</tr>
<tr>
<td>Add category button label</td>
<td>The selected value is shown next to the catalog or category at runtime.</td>
</tr>
<tr>
<td>Add category enabled indicator</td>
<td>Allows buttons to be shown next to the catalog or categories.</td>
</tr>
<tr>
<td>Enforce product group selection R13GA</td>
<td>Hides sales catalog product group hierarchy nodes in the runtime UI. Click Yes to make it so users cannot select product groups while browsing and hide product groups in the opportunity Products table list of values.</td>
</tr>
<tr>
<td>Records per page</td>
<td>The number of records to be displayed per page.</td>
</tr>
<tr>
<td>Sort by format text</td>
<td>The sort format of the entire label that you want displayed in the runtime interface. The default is <code>ATTR</code>: <code>{SORT_ORDER}</code>. Example: Name: A to Z.</td>
</tr>
<tr>
<td>Sort by product label prefix</td>
<td>The sort format of the prefix label that you want displayed.                Example: If the default is Name: A to Z, you can select an alternate label for Name. It could be Item: A to Z.</td>
</tr>
<tr>
<td>Sort by sequence product ascending label</td>
<td>The sort format of the ascending suffix label that you want displayed. Example: If the default is Name: A to Z, you can select an alternate for A to Z. It could be Name: Ascending.</td>
</tr>
<tr>
<td>Sort by sequence product descending label</td>
<td>Sort format of the descending suffix label that you want displayed. Example: If the default is Name: Z to A, you can select an alternate for Z to A. It could be Name: Descending.</td>
</tr>
<tr>
<td>Sort by sequence ascending first indicator</td>
<td>Select Yes to display ascending labels first in the Sort By list of values.</td>
</tr>
<tr>
<td>Show immediate child products only</td>
<td>Shows immediate products of a given category disregarding the standard action of showing all products (including child categories) if narrow by is defined on the category.</td>
</tr>
</tbody>
</table>
### Setting Sales Catalog Usage Options: Procedure

You can use the product group usage pages in Setup and Maintenance to change many actions of the sales catalog in the runtime UI. For example, you can configure whether the sales catalog displays only product groups and products within a user’s sales territories, or if it displays all product groups and products defined in the catalog.

#### Setting Usage Options

The following are the high-level steps to set usage options.

For more information on the options that can be set, see the topic, Configuring Catalog Usages: Explained.

1. Sign in as the sales administrator or as a setup user and navigate to the Setup and Maintenance work area.
2. Navigate to the **Sales** offering icon and click the **Setup** button.
   
   The Setup: Sales page appears.
3. In the list of functional areas, click the **Sales Catalog and Products** area.
   
   A list of required tasks for the area appears.
4. In the list of tasks, click the **Manage Product Group Usage** task.
   
   The Manage Product Group Usage page appears.
5. Select the **Base** catalog in the upper portion of the page. (If your catalog uses a different usage, then select it.)
   
   In the Details region of the page, the Product Groups tab shows the catalogs associated with the usage you have selected.
6. To have the settings apply to a particular product node (or catalog), optionally, in the Product Groups tab, select the product group before making the changes in the other tabs.
7. To modify functions, such as territory filtering, click the **Functions** tab in the Details section of the page.

---

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Image server</td>
<td>Identifies the source of images for products and product groups.</td>
</tr>
<tr>
<td>Image server alternate path</td>
<td>Identifies an alternate image source location (URL)</td>
</tr>
<tr>
<td>Enable transactional attribute</td>
<td>Allows transactional attributes to show up in product detail page. Transactional attributes are attributes that can be selected such as color and size of shirt.</td>
</tr>
<tr>
<td>Hidden category optional attribute list</td>
<td>You can specify the attributes you would like to hide from the category list. Enter a comma-separated list of attributes to be hidden.</td>
</tr>
<tr>
<td>Hidden product optional attribute list</td>
<td>You can specify the attributes you would like to hide from the product pages. Enter a comma-separated list of attributes.</td>
</tr>
<tr>
<td>Hide quantity</td>
<td>To hide the quantity field shown in the product page, set this to Yes.</td>
</tr>
<tr>
<td>Hide unit of measure</td>
<td>To hide the unit of measure field shown in the product detail page, set this to Yes.</td>
</tr>
</tbody>
</table>
Within the Functions tab, you click the **Value** drop-down list for the option you want to modify. If multiple applications have a row for an option, then select the row that has the application you want the setting to apply to. The applications that can use each option appear in the Mode column of the Functions tab. For example, click **Territory engine** for the Opportunity Management application shown in the Mode column.

8. To set miscellaneous options, such as button labels to display and the number of products to display per page, click the Miscellaneous tab and then make your selection.
9. Save your changes.

### Performance-Tuning Opportunity Products Search: Explained

By setting a profile option, you can enable or disable the smart list in the Product list of values in the Products table in opportunities. The smart list is a pre-fetched list of products. For performance reasons, Oracle recommends that if you have more than 5,000 products in the application, then you should prevent the entire smart list from being pre-loaded when a user clicks the pre-loaded list.

As a user types, the application searches against the product smart-list entries. If the user clicks the drop-down list then the application initializes the complete smart-list. To disable the preload of the smart list, set the profile option Preload Territory-Filtered Product List Enabled (ZBS_ENABLE_PRODUCTLOV_SMARTLIST) to No. By default, the profile option is set to yes.

#### Setting the Profile Option

Use the following procedure to set the Preload Territory-Filtered Product List Enabled profile option.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values
2. In the Manage Administrator Profile Values page, search for and select the profile option name, Preload Territory-Filtered Product List Enabled, or the code, ZBS_ENABLE_PRODUCTLOV_SMARTLIST.
3. Set the profile option to No to disable the preload of the smart list.
4. Save your changes.

#### Related Topics

- Accessing Tasks to Update Existing Setup Data: Procedure

### What's the difference between the administration and published product group versions?

The administrator who defines the product group uses the administration version. The user of the sales catalog sees the published version.

> **Note:** When you publish the administration version, you make it available as the published version.
What's a related group?

A related group shows the relationship between two different product groups. For example, a group that contains extended warranties for computers is related to a group that contains laptop computers. Various relation types are supported, such as revenue, service, and so on. This relationship is used in the other applications.

What's a rollup catalog?

A rollup catalog is used primarily to create a hierarchy that’s useful for forecasting. In forecasts, each product appears only once, so the rollup catalog can’t have the same product appearing multiple times within its hierarchy.

A sales catalog can have the same product appearing multiple times within its hierarchy. For example, the product Toys can be part of the Children category as well as the Electronics category within the same catalog.

Note: The Allow Duplicate Children check box distinguishes controls whether a product group can have duplicate child nodes.

Catalog Maintenance

How can I change the labels for filter attributes at run time?

In the Filter Attributes tab of the Manage Product Group page, change the value in the Display field for the attribute.

You can create a name displayed at run time, which is more user-friendly than the attribute’s internal name. For example, if the attribute name is Laptop Color, then you can change the display name to Available Colors. This new name will be displayed in the Narrow By or Advanced Search options at run time.

How can I change sales catalog button labels?

You can change display attributes of specific product groups. For example, you can change the default Add to Cart label, and you can select a different label, such as Add to Shopping Cart. On the Manage Product Groups page, select the Display Options tab and the Miscellaneous subtab.

Before you can select values as button labels, they must be values of the lookup Add Item Label Values in the Manage Product Group Lookups page.

How can I set exceptions for particular usages of product groups?

In the Manage Product Group Usage page, select a usage. For example, select the Base usage. Click the product group in the Product Groups tab, select the usage in the Modes tab, and use the other tabs to specify the exceptions for this usage.
You use this method to modify the appearance of a product group in minor ways for different uses. For example, you might want a product group to look slightly different when it is used for lead management and for campaign management.

Catalog Use Case Examples

Creating a Sales Catalog: Worked Example

In this example, a business that sells chairs and sofas is setting up the product catalog for the first time.

Creating a Sales Catalog

1. Sign in as the sales administrator or as a setup user and navigate to the Setup and Maintenance work area. The Setup page appears with an offering selected.
2. In the Setup page, select the Sales offering. The Setup: Sales page appears with a list of functional areas.
3. In the list of functional areas, click the Sales Catalog and Products area. A list of required tasks for the area is displayed.
5. In the Manage Product Groups page, add a new record to the Product Groups list.
6. In the Details dialog window, enter the data shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Sample Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>ComfyGooseCatalog</td>
</tr>
<tr>
<td>Display</td>
<td>Comfy Goose Catalog</td>
</tr>
<tr>
<td>Description</td>
<td>Contains ergonomic chairs for your home or office at attractive prices.</td>
</tr>
<tr>
<td>Root Catalog</td>
<td>Select this check box to make this a root catalog.</td>
</tr>
</tbody>
</table>

7. In the Details tab, select the image that you want to display in this catalog.
8. In the Subgroups tab, create the following product groups, which are the categories for this product catalog.

<table>
<thead>
<tr>
<th>Field</th>
<th>Sample Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subgroup Name</td>
<td>Chairs</td>
</tr>
<tr>
<td></td>
<td>Sofas</td>
</tr>
<tr>
<td></td>
<td>Medical Chairs</td>
</tr>
<tr>
<td></td>
<td>Sports Chairs</td>
</tr>
<tr>
<td></td>
<td>Chairs and Stools</td>
</tr>
</tbody>
</table>

9. Add further categories within some subgroups by switching from list to tree view and selecting the categories within which you want subgroups.

Tip: To show the catalog in hierarchy mode so that you can see the nesting of the product groups, click the hierarchy icon in the Manage Product Groups pane.
Add the following categories within subgroups.

<table>
<thead>
<tr>
<th>Parent Subgroup</th>
<th>Sample Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chairs</td>
<td>▪ Heavy Duty/Call Center Chairs</td>
</tr>
<tr>
<td></td>
<td>▪ Ergonomic Chairs</td>
</tr>
<tr>
<td></td>
<td>▪ Leather Chairs</td>
</tr>
<tr>
<td></td>
<td>▪ Event Chairs</td>
</tr>
<tr>
<td>Sofas</td>
<td>Sofas and Loveseats</td>
</tr>
<tr>
<td>Sofas and Loveseats</td>
<td>▪ Leather Sofas</td>
</tr>
<tr>
<td></td>
<td>▪ Reception and Lounge Sofas</td>
</tr>
<tr>
<td></td>
<td>▪ Loveseats</td>
</tr>
</tbody>
</table>

10. In the Products tab, add products to all the subgroups that you created.
11. Click **Publish** to publish the product hierarchy that you just created.

A published catalog is available for use by different departments.

12. You must enable a sales catalog for use by associating it with the Base usage. To associate a published catalog with a particular usage, go to the Product Group Usage page and select the Base usage. Then, click the Product Groups subtab and select the catalog that you just created.

For additional information on getting started with creating sales catalogs, see the topic, Creating a Sales Catalog: Getting Started.

Reusing a Sales Catalog: Worked Example

This example demonstrates how you can reuse a sales catalog. After creating a catalog for a business that sells chairs and sofas, you get a call from another division of the company that wants a similar catalog with the same look-and-feel.

You find that this division needs the products in the Chair category of your existing catalog, so you can reuse this category instead of creating a new catalog.

**Note:** To complete this task, an application developer must create an application that can use the sales catalog task flows, just like the Sales module uses the task flows provided by the sales catalog team.

**Prerequisite**

You can choose only product groups that are catalogs themselves. In other words, the catalog must be a root catalog. You realize the Chairs group is a category of your larger catalog, so you must make it a root catalog as a prerequisite to reusing the category.

1. On the Manage Product Groups page, in the product group list, select Chairs.
2. In the Details tab, select the Root Catalog check box.
3. Save and publish the catalog.
Reusing the Sales Catalog

1. On the Manage Product Group Usage page, create a new usage and name it the Call Center Division usage.
2. Click the Product Groups subtab.
3. In the Manage Product Groups Usage page, add the product group Chairs to the new usage that you created.
   The Chairs catalog is now available for the Call Center Division.

Adding Filter Attributes to Sales Catalog Product Groups: Worked Example

This example shows how to enable filtering by attributes in the sales catalog.

Use case: A business that sells furniture wants to provide filters in the catalog that let users narrow the product groups based on an attribute, such as color.

Prerequisite

Before you perform this task:

- The filtering attributes must already be registered. You register attributes in the Manage Product Group Attributes page.
- The filtering attributes must be associated with the products in the item master.

Filtering Product Groups by Attributes

1. Sign in as the sales administrator or as a setup user and navigate to the Setup and Maintenance work area. The Setup page appears with an offering selected.
2. In the Setup page, select the Sales offering. The Setup: Sales page appears with a list of functional areas.
3. In the list of functional areas, click the Sales Catalog and Products area. A list of required tasks for the area is displayed.
5. In the Manage Product Group page, select a product group. For example, select the group named Chairs.
6. With the product group selected, click the Lock button.
7. Click the Filter Attributes tab.
8. In the Filter Attributes tab, click New to add a new attribute.
   The Create Filter Attribute dialog box appears.
9. In the Create Filter Attribute dialog box, Name field, search for and select the filter attribute.
   For example, select the Color attribute.
10. Optionally, in the Create Filter Attribute dialog box, select the Advanced Search, Narrow By and Sort By check boxes for the attribute, so that this attribute will be displayed in those regions at run time.
11. Click OK in the Create Filter Attribute dialog box to save your changes.
12. In the Attribute Values area, add records and enter values for the attributes.
   For example, add Blue, Pink, and Black as the values for the chair color.
13. Unlock the group, save the changes, and publish the product group.
   After publishing the product group, you validate the changes in the catalog. You can see the attributes that you created and their values in the Advanced Search, Narrow By, and Sort options of the catalog.
Catalog Troubleshooting

Best Practices for Sales Catalog Setup

Sales catalog and product group setup can be quite complex. Therefore, be sure to follow the best practices described in this topic.

The following are the main best practice areas covered in this topic:

- Importing product groups
- Finding and entering reference numbers
- Checking your work before publishing or importing
- Locking and publishing product groups
- Associating the product group root with the Base usage
- Creating a new product group hierarchy
- Running a scheduled process after changing Base usage

Importing Product Groups

If your import file contains spelling and other errors, you can make your corrections in the same file and import again. The import process overwrites the existing entries.

Finding and Entering Reference Numbers

Unique product group reference numbers can be used to establish the relationships between parent and child product groups in the file-based import spreadsheet. You can find the reference number in the Reference Number column in the Manage Product Groups page.

In your import spreadsheet, be sure any numbers are formatted as numbers (versus, for example, formulas), with zero digits to the right of the decimal. Otherwise, the import process cannot recognize them. For example, generally, when you paste the reference number into a spreadsheet, the spreadsheet will automatically format it as something other than a plain number. In order for the import process to recognize the number as a number, you may need to explicitly format it as a number (with zero digits to the right of the decimal).
The following figure shows an example of a reference number after being pasted into a spreadsheet cell (in the first highlighted box), and then the same reference number formatted as a number with no digits to the right of the decimal (in the second highlighted box).

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td>PGHeader Reference</td>
<td>PGHeader PGHeader PGHeader</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>3E14</td>
<td>VisionCor US</td>
<td>Y</td>
</tr>
<tr>
<td>3</td>
<td>PG1</td>
<td>GreenSen US</td>
<td>Y</td>
</tr>
</tbody>
</table>

### Checking Your Work Before Publishing or Importing

After you have published a product group, you cannot delete it. You can only make it inactive. For this reason, you should check your work before you publish the product groups you create in the UI and before you import. Importing publishes all unpublished product groups automatically, even those that are not in your file.

1. Click on the root group name in the list and then click the tree view icon in the tool bar.
2. Check that the names are correct and that the hierarchy is set up as you want it.

### Locking and Publishing Product Groups

Any product group you want to edit must be "locked". You lock a group by selecting it in the UI and then clicking the Lock button. When you lock a product group, no one else can make changes to it until it’s unlocked again.

Any product group hierarchy you want to use in consuming applications must be published. Publishing is done by clicking on the root node of the group and then clicking the Publish button or when you import your product group data file. When you publish, the application will publish all product groups that are locked. If you don’t want some groups to be published, then you must unlock them.

### Setting Product Group Hierarchy Base Usage

The root product group you use for leads, opportunities, and territories must be assigned to a usage called "Base". This assignment is performed in the Manage Product Group Usage page accessible in Setup and Maintenance. Use the Manage Product Group Usage task to get to the page.

*Note:* The root product group must be published to be able to associate it to Base usage.

### Creating a New Product Group Hierarchy

If for some reason you don’t want to use a product group hierarchy that you have created, you can always create a new root and subgroups, publish them, and associate the Base usage with the new product group root.
Running a Scheduled Process After Changing Base Usage

Each time you make a new assignment of Base to a root product group, you must run the scheduled process Refresh Denormalized Product Catalog Table for BI. If you do not run the process, your product group hierarchy may not appear in the consuming applications. Also, if you use future start or end dates for product groups, then you should schedule the refresh process periodically as well.

How can I check whether my catalog is used by other catalogs?

You can get this information from the Sharing region in the Manage Product Groups page. By default, all product groups can be shared.

Why can't I modify a product group?

To modify a product group, you must first lock it. Select Lock in the Manage Product Group page. If the product group is locked by another user, then the locked indicator is visible, and you cannot modify the product group.

Why did some of the products in my published catalog disappear?

Products in your catalog are active for a specified period. When the product is no longer active, it doesn't appear in the published catalog. You can activate products using the Products tab of the Manage Product Groups page.
15 Setting Up Price Books

Price Books: Explained

Use price books to create product lists with prices that you can then use in other sales applications, such as contracts, accounts, and opportunities.

The following are use cases for using price books:

- Set default list prices on contract sales agreements. See the topic, Creating a Sales Agreement Line: Explained, for more information.
- Associate price books with accounts and opportunities. For more information see the article, Enabling Price Books in Opportunities, available on My Oracle Support (support.oracle.com) as Doc ID 2000330.1.

Price Book Prerequisites

To use price books, your sales catalog must be set up with the products they use included in a product group. See the topics on sales products and sales catalogs for more information.

Price Book Statuses

Price books have statuses, such as Draft or Active. The status of a price book determines what actions you can take on it.

The following table shows price book statuses and additional information about the behavior of price books while in a specific status.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Additional Details</th>
</tr>
</thead>
</table>
| Draft  | Indicates a price book that is not yet available for use. | • Only price books in Draft status can be deleted.  
  • Can be moved to Active status. |
| Active | Indicates a price book that is available for use. | • Can be updated to Expired status.  
  Note you cannot delete expired price books.  
  • Cannot be updated to Draft status. |
| Expired| Indicates a price book that is no longer available for use. | • Cannot be moved to Draft status; therefore, can never be deleted. |
The following image shows the transitions allowed for the statuses.

![Price Book Status Transitions]

- Draft → Active → Expired

Related Topics
- Sales Products: Overview
- Sales Catalogs: Overview
- Creating a Sales Agreement Line: Explained

Working with Price Books: Procedures

You use price books to create product lists with prices that you can then use in other sales applications, such as enterprise contracts, accounts, and opportunities.

Creating a Price Book

Use the following procedure to create a price book.

1. Sign in as the sales administrator.
   The Price Books landing page appears.
3. Click Create Price Book.
   The Create Price Book page appears.
4. Enter the details of the price book.
   - **Name**: Enter a unique name for the price book.
   - **Currency**: Select a currency from the list of implemented currencies. Note that the currency set in your user preferences is initially used as the default currency.
   - **Description**: Optionally, enter a description for the price book.
5. Click Save and Continue. Or, click Save to save the price book so you can edit it later.
   The default status for a new price book is Draft.
6. In the Edit Price Book page, add products. Click Add to add a single product line. Click Add Many to add several product lines.
7. Search for and select the product or products. Click OK in the search page to return to the edit page.
8. For each product line, fill in the following fields:
   - **UOM**: Select the unit of measure.
LIST PRICE: Enter a price.

9. Save your changes by clicking Save or Save and Close.
10. When you're ready for your price book to become active and ready for use, change the Status to Active. After you save a price book in Active status, the name cannot be updated.

**Editing a Price Book**

Price books can be edited, but not all of the fields are editable when they are Active. See the Price Book Statuses section in this topic for more details on which fields are editable in the various statuses.

Use the following procedure to edit a price book.

1. Sign in as the sales administrator.
   - The Price Books landing page appears.
3. Click the name of a price book.
   - The Edit Price Book page appears.
4. Edit the price book as needed.

**Copying a Price Book**

You may want to copy a price book to save the time needed to create a new one. You can copy price books while they are in any status.

Use the following procedure to copy a price book.

1. Sign in as the sales administrator.
   - The Price Books landing page appears.
3. Click the name of a price book.
   - The Edit Price Book page appears.
4. From the Actions menu, select Copy Price Book.
5. In the dialog box, enter a new, unique name for the price book and click Save and Continue.
   - The Edit Price Book page appears.
6. Edit the price book as needed.

**Deleting a Price Book**

Deleted price books are removed from the list of price books and are not available in consuming applications. Only price books in Draft status can be deleted.

Use the following procedure to delete a price book.

1. Sign in as the sales administrator.
3. Click the name of a price book.
   - The Edit Price Book page appears.
4. From the Actions menu, select Delete Price Book.
## Setting Up Promotions

### Sales Promotions: Overview

Salespeople can create and manage promotions that offer discounts based on specified conditions. After they’re created, promotions can be used in other applications that want to leverage promotions in their pages.

*Note:* No implementation tasks are required to set up promotions in sales. However, to leverage promotions, you must modify the consuming applications.

### Promotions Tasks

As the sales administrator, you can perform the following tasks with sales promotions:

- Create promotions
- View and edit promotion details and attributes
- View a list of promotions
- Search for promotions
- Copy promotions
- Import promotions and create and update promotions using Oracle file-based import

### Working with Sales Promotions: Procedures

Use the procedures in this topic as you create and maintain sales promotions.

This topic covers the following tasks:

- Viewing a list of sales promotions: This task includes searching and filtering.
- Creating promotions: This task includes entering promotions basic information.
- Editing promotions: This task includes modifying the details of promotions.
- Copying promotions: This task includes copying a promotion so that you can repurpose it.
- Deleting promotions.

*Note:* No implementation tasks are required to set up promotions. However, to leverage promotions, you must modify the consuming applications.

### Viewing a List of Promotions

To view a list of promotions, sign in as the sales administrator and navigate to **Sales > Promotions**.

In the list or summary page, you can:

- Search for promotions using the **Find** text box. For more information, see the topics on using search.
Creating and Editing Promotions

Creating promotions includes entering basic information, such as name and status, and saving the promotion for the first time. In edit mode you enter more details, such as the type of discount and the discount value.

Use the following procedure to create and edit a new sales promotion.

1. Sign in as the sales administrator and navigate to Sales > Promotions.
   The list of promotions appears.
2. Click the Create Promotion button.
   The Create Promotion page appears.
3. In the Name field, enter a unique name.
4. Optionally, enter a description for the promotion.
5. Optionally, select effective start and end dates.
6. Click Save and Continue to save the promotion and begin entering additional details.
   The page refreshes and becomes the Edit Promotion page.

   ✍️ Note: At this point you can copy the promotion or delete it.

7. In the Status field, select the status of the promotion. Inactive promotions are not available in consuming applications.
8. In the Type field, select the adjustment type. The type can be either:
   - Fixed amount: Select Line Discount Amount.
   - Percentage: Select Line Discount Percent.
9. In the Apply To field, select whether the discount should apply to:
   - List Price: List price is the advertised, published or sticker price on a product being marketed to a business or consumer buyer.
   - Net Price: Net price is the actual price paid once any discounts are taken off the list price.
10. In the Value field, enter an amount. The amount is either the percentage of the discount or a fixed amount, depending on which type of adjustment you selected in the Type field.

Copying Promotions

To repurpose existing promotions, you can copy them any time after saving them.

Use the following procedure to copy a sales promotion.

1. Sign in as the sales administrator and navigate to Sales > Promotions.
   The list of promotions appears.
2. Select the name of a promotion in the list.
   The Edit Promotion page appears.
3. From the Actions menu, select Copy Promotion.
   The Copy Promotion dialog window appears.
4. In the **Name** field, enter a new, unique name for the promotion.

5. Click the **Save and Continue** button.

The Edit Promotion page appears, where you can edit the details of the promotion. See the Creating and Editing Promotion section in this topic for more information.

### Deleting Promotions

To delete a promotion:

1. Sign in as the sales administrator and navigate to **Sales > Promotions**.

   The list of promotions appears.

2. Select the name of a promotion in the list.

   The Edit Promotion page appears.

3. From the Actions menu, select **Delete Promotion**.

4. Click Yes in the warning message window.
Sales Campaigns: Overview

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.

Implementation Concepts for Sales Campaigns

Setting Up E-Mail Sales Campaigns

Sales managers and salespeople use sales campaigns to promote a specific product or event to specific customers in a personalized e-mail campaign. These campaigns can contain links that recipients can respond to, and their responses can
be tracked. You can set up language-specific versions of templates, headers, and footers, to use in international campaigns. This topic outlines the steps that you perform to set up a sales campaign.

Validating the E-Mail Server

The e-mail server provides:

- The e-mail sending daemon that delivers e-mail
- The bounce-handling daemon that tracks e-mails that cannot be delivered
- The click-through daemon that tracks e-mail recipient responses

To validate the e-mail server, perform the following steps:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Campaigns
   - Task: Manage Marketing Supplier Details and Distribution Profiles
2. In the Oracle Fusion Email and Web Marketing: Distribution Profiles area, select the E-Mail Profile.
3. Verify the following server details for the selected ESD e-mail delivery channel:
   - CTD protocol
   - CTD host
   - CTD port
   - BHD
4. Click Cancel or click Save and Close if you made changes.

Setting Up Headers and Footers

You create header and footer content for e-mail messages delivered as part of your e-mail sales campaign. The e-mail header and footer can be assigned to a specific organization unit and language. It can be in HTML or text format and can be marked for restricted viewing.

To create header and footer content, perform the following steps:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Campaigns
   - Task: Manage Marketing E-Mail Headers and Footers
2. On the Manage Marketing E-Mail Headers and Footers page, select Create from the Actions list.
3. Enter the following information on the Create E-Mail Header or Footer page:
   a. Name Enter a descriptive name.
   b. Language Select American English or whatever language that you want.
   c. Select the Primary check box.
   d. Select Header in the Type field.
   e. In the HTML or Plain Text subtab, set up your header.
   f. Click Save and Close.
4. Repeat the steps 2 and 3 to create a footer. Be sure to select Footer for Type.
Setting Up the Marketing Template
Use treatment templates to help you quickly create:

- Treatments
- Channel specific marketing promotions
- Marketing messages
- Fulfillment instructions to assign to campaigns

To create a treatment template, perform the following steps:

1. Select the Manage Marketing Treatment Templates task.

The Manage Marketing Treatment Templates page appears.

2. Click the Create icon.

3. On the Create Treatment Template page, enter the required information.

4. Select the Active check box.

5. Either upload your HTML template as a file, or paste it in the work area.

6. Click Save and Close.

Related Topics
- Accessing Tasks to Update Existing Setup Data: Procedure

Sales Campaign Content: Explained
You can personalize your sales campaign by adding components such as images, merge fields and response forms.

To create the content of your sales campaign, you can add any combination of the following:

- Images
- Merge fields
- Response forms
- Standard and other URLs
- Conditional content

Images
Add graphic images to your email. You can provide a link to an image already on a server, or select a local file and upload it to the server. Specify the size and placement of the image. You can add a URL of a publicly hosted image using the img src tag.

Merge Fields
Personalize your email message body by adding placeholders from a list of merge fields, such as the recipient’s first name. Merge fields are standard sets of attributes pertaining to an individual contact. You can insert them into your email content. When you launch the campaign, merge fields are dynamically populated directly from the database. With sales campaigns you can also compose a personalized text message for each recipient.
Response Forms
Insert response forms as active links in your email campaign content. When a contact clicks one of the links, a specific response is automatically generated. All such responses are gathered and monitored, to track contacts’ actions. Available response forms for sales campaigns are:

- Forward to Friend
- Request Call Back
- Request More Information

Standard URLs
You can add any of the following types of URL:

- Standard URLs are predefined and commonly used across the enterprise.
- A URL can be created when you define your email content.

By default, all standard URLs are tracked automatically. You can optionally enable tracking for other URLs, or disable tracking for standard URLs. With tracking enabled, every time a contact clicks a link in a campaign email, the click is recorded as a specific response, together with details pertaining to the URL.

Conditional Content
Conditional content is inserted or omitted based on the results of a rule. There are two elements that you can use to generate conditional content within an email:

- If-Then-Else cases are used to determine if a block of text or HTML is removed from an outgoing email, by verifying if a merge field value is defined. The merge field is defined if it is not an empty string or, for numeric merge fields, if it is not a value of 0 (zero). If the merge field is defined, the block of text or HTML remains in the outgoing email. If the merge field is not defined, the block of text or HTML is removed from the outgoing email.
- Named Blocks are used to decide whether or not 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.

Importing Marketing Treatments: Explained
You can create or update marketing treatments by navigating to the Treatments work area and treatment templates by navigating to Setup and Maintenance and selecting the Manage Marketing Treatment Templates task, or by importing data through interface tables. To import treatments and treatment templates, you use the tool of your preference to load the data then use scheduled processes to import the data. Having a good understanding of the application objects, interface tables, and destination tables will help you prepare your import data.

Consider the following when importing treatments:

- Import interface tables, destination tables, and application entities
- Scheduled processes

Import Interface Tables, Destination Tables, and Application Entities
The treatment and treatment templates consists of many entities that form the treatment. Each entity is tied to an interface table.

For information about available import attributes, see the sales File-Based Data Import guide available on the Oracle Help Center (docs.oracle.com). In the File-Based Data Imports chapter, see the topic for your import object of interest, which includes links to reference files for target import objects.
The following table lists the interface tables, destination tables, and resulting application entities:

<table>
<thead>
<tr>
<th>Interface Tables</th>
<th>Destination Tables</th>
<th>Application Entities</th>
</tr>
</thead>
<tbody>
<tr>
<td>MKT_IMP_TREATMENTS</td>
<td>MKT_TM_TREATMENTS</td>
<td>Marketing Treatment and Treatment Template</td>
</tr>
<tr>
<td>MKT_IMP_TRMT_ITEM_ASSOC</td>
<td>MKT_TM_TRMT_ITEM_ASSOC</td>
<td>Treatment and Treatment Template Product and Product Group</td>
</tr>
<tr>
<td>MKT_IMP_TRMT_PROM_ASSOC</td>
<td>MKT_TM_TRMT_PROM_ASSOC</td>
<td>Treatment Promotion</td>
</tr>
<tr>
<td>MKT_IMP_TRMT_URLS_ASSOC</td>
<td>MKT_TM_TRMT_URLS_ASSOC</td>
<td>Treatment and Treatment Template Marketing URL</td>
</tr>
</tbody>
</table>

To obtain the unique IDs of existing application data, use the **Define Data Export Setup and Maintenance** task list.

You can import user-defined attributes in the same process as your treatment object. Design your object model modifications in Application Composer and generate the required artifacts to register your changes and make them available for importing before you populate the corresponding modified columns in the interface tables.

**Scheduled Processes**

Navigate to **Scheduled Processes** to schedule the import of data from the interface tables to the destination tables.

The following table displays the process you can schedule to import treatments and treatment templates:

<table>
<thead>
<tr>
<th>Process Name</th>
<th>Process Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BulkTreatmentsJob</td>
<td>Import Marketing Treatments</td>
</tr>
</tbody>
</table>

**Related Topics**

- File-Based Data Import guide

**Importing Marketing Suppliers: Explained**

You can create or update marketing suppliers by navigating to **Setup and Maintenance** and selecting the **Manage Marketing Supplier Details and Distribution Profiles** task or by importing data through interface tables. To import suppliers, you use the tool of your preference to load the data then use scheduled processes to import the data. Having a good understanding of the application object, interface tables, and destination tables will help you prepare your import data.

Consider the following when importing marketing suppliers:

- Import interface tables, destination tables, and application entities
- Scheduled processes

**Import Interface Tables, Destination Tables, and Application Entities**

The marketing supplier consists of many entities that form the supplier. Each entity is tied to an interface table.
For information about available import attributes, see the sales File-Based Data Import guide available on Oracle Help Center (docs.oracle.com). In the File-Based Data Imports chapter, see the topic for your import object of interest, which includes links to reference files for target import objects.

The following table lists the interface tables, destination tables, and resulting application entities:

<table>
<thead>
<tr>
<th>Interface Tables</th>
<th>Destination Tables</th>
<th>Application Entities</th>
</tr>
</thead>
<tbody>
<tr>
<td>MKT_IMP_VENDORS</td>
<td>MKT_TM_VENDORS</td>
<td>Marketing Supplier</td>
</tr>
<tr>
<td>MKT_IMP_VENDOR_PROFILES</td>
<td>MKT_TM_DLVPROFILE</td>
<td>Distribution Profile and Delivery Channel Parameters</td>
</tr>
<tr>
<td></td>
<td>MKT_TM_DLV_PRF_PARAMS</td>
<td></td>
</tr>
</tbody>
</table>

To obtain the unique IDs of existing application data, use the Define Data Export Setup and Maintenance task list.

Scheduled Processes

Navigate to Scheduled Processes to schedule the import of data from the interface tables to the destination tables.

The following table displays the process you can schedule to import marketing suppliers:

<table>
<thead>
<tr>
<th>Process Name</th>
<th>Process Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BulkVendorJob</td>
<td>Import Marketing Suppliers</td>
</tr>
</tbody>
</table>

Related Topics

- File-Based Data Import guide

Using Conditional Content in Sales Campaign Templates: Explained

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 the insert the block.
3. Create the Insert Block statement as follows:
   - In the editor toolbar, select **Insert Block** from the rule conditions drop-down list.
   - 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.
   - Click **Insert**.
4. Create a Define Block component as follows:
   - In the drop-down list immediately within the email tag, select **Create Block**.
   - A `$({DefineBlock ""})` and `$({EndBlock})` statement appear in the text.
   - Type a field value within the quotation marks of the `$({DefineBlock ""})` statement.
   - This is the value that drives the content displayed in the block.
   - Type the text that you want to insert into the email between the `$({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},
$(endif)

- 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:

$(if ${Account.Bill to State} == “CA”) Join us all month long for special events and workshops held in each of our California locations.
$(else) Join us all month long for weekly online workshops and special offers at www.mycompany.com/events. $(endif)

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

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 $(endif).

Profile Options for Sales Campaigns: Explained

Profile options are configurable options that affect application operations. Values defined at the user level take precedence over those at the site level. If a value is not defined at the user level, the site level value is used.

The effect of setting each of the sales campaign profile options are described under the following broad sections:

- Design Sales Campaigns
- Manage Responses
- Define File-Based Data Import and Data Migration

Design Sales Campaigns

The following table lists the profile options and the effect of setting each on the design of sales campaigns.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Campaign Maximum Contacts</td>
<td>Specify the maximum number of contacts that sales users can target in a sales campaign launch.</td>
</tr>
<tr>
<td>Allow Treatment Template</td>
<td>Specify a default treatment template.</td>
</tr>
<tr>
<td>E-mail Treatment Distribution Profile Default</td>
<td>Select the fulfillment supplier’s distribution profile used as the default value when creating e-mail treatments.</td>
</tr>
<tr>
<td>E-mail Treatment Supplier Default</td>
<td>Select the fulfillment supplier used as the default value when creating e-mail treatments.</td>
</tr>
<tr>
<td>Read Receipt Response Form Default</td>
<td>Enable the automatic use of read receipt tracking to HTML e-mail treatment content. This profile option can be updated at the user level.</td>
</tr>
<tr>
<td>SMS Treatment Distribution Profile Default</td>
<td>Select the fulfillment supplier’s distribution profile used as the default value when creating short message service treatments.</td>
</tr>
</tbody>
</table>
Manage Responses

The following table lists the profile options and outlines the effect of setting each on the management of marketing responses.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Response to Lead Mapping</td>
<td>Specify the mapping file name created in Application Composer, Copy Maps. This file is used to map objects and attributes when a Response is converted to a Lead.</td>
</tr>
<tr>
<td>Response to Opportunity Mapping</td>
<td>Specify the mapping file name created in Application Composer, Copy Maps. This file is used to map objects and attributes when a Response is converted to an Opportunity.</td>
</tr>
</tbody>
</table>

Define File-Based Data Import and Data Migration

The following table lists the profile options and outlines the effect of setting each for marketing data migration and for defining file-based data import.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing Migration Look Back Period</td>
<td>Specify a number of days to precede the migration date, so that all marketing records modified before the specified number of days are migrated prior to the downtime period.</td>
</tr>
<tr>
<td>Migrate Siebel Marketing Prospect Data</td>
<td>Specify the way in which marketing prospect data is migrated.</td>
</tr>
<tr>
<td>WebCenter Content Applet Enabled</td>
<td>Enable Oracle WebCenter Content applet to browse and load large files when creating file import processing activities.</td>
</tr>
</tbody>
</table>

Related Topics

- Sales Lead Profile Options: Explained
- Sales Lead Lookups: Explained
Marketing Standard URLs

How Standard URLs and Marketing Content Fit Together

When creating marketing content, you can insert various types of URLs. Standard URLs are one type that you predefine and that can be used across many sales campaigns. Additional URLs are common response forms predefined by Oracle and ad hoc URLs that can be defined while creating content, if a predefined URL does not already exist. An ad hoc URL is not reusable.

Standard URLs

Navigate to the Manage Standard URLs task in the Functional Setup Manager application to define Standard URLs that can be easily selected when creating marketing content.

Enable tracking if you want to track email recipient clicks. If enabled, every time a contact clicks a link in a campaign email, the click is recorded as a response, together with details pertaining to the URL.

Managing URL Categories

The Marketing URL Category lookup provides the choices for Standard URL categories. Your application administrator can add categories by navigating to the Manage Marketing Standard Lookups task in the Functional Setup Manager application.

Marketing Content

To include a predefined standard URL in your marketing content, select the Element toolbar button from the Edit Treatment Template page and then select Standard URL. This feature is available for content created or edited in Treatments, Treatment Templates, and Sales Campaigns.

Importing Marketing Standard URLs: Explained

You can create or update marketing standard URLs by navigating to the Setup and Maintenance work area and selecting the Manage Marketing Standard URLs task or by importing data through interface tables. To import marketing standard URLs, you use the tool of your preference to load the data then use scheduled processes to import the data. Having a good understanding of the application object, interface table, and destination table will help you prepare your import data.

Consider the following when importing marketing standard URLs:

- Import interface table, destination table, and application object
- Scheduled processes

Import Interface Table, Destination Table, and Application Object

Importing marketing standard URLs involves one interface table and one destination table.

For information about available import attributes, see the sales File-Based Data Import guide available on the Oracle Help Center (docs.oracle.com). In the File-Based Data Imports chapter, see the topic for your import object of interest, which includes links to reference files for target import objects.

The following table lists the interface table, destination table, and resulting application object:
To obtain the unique IDs of existing application data, use the **Define Data Export Setup and Maintenance** task list.

### Scheduled Processes

Navigate to **Scheduled Processes** to schedule the import of data from the interface tables to the destination tables.

The following table displays the process you can schedule to import marketing standard URLs:

<table>
<thead>
<tr>
<th>Process Name</th>
<th>Process Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BulkURLsJob</td>
<td>Import Marketing Standard URLs</td>
</tr>
</tbody>
</table>

### Related Topics

- File-Based Data Import guide

### Marketing Campaigns and Campaign Members

#### Campaign Management and Reporting: Overview

Marketing data such as campaigns and campaign members created and updated in Oracle Marketing Cloud can now be stored in your sales application. Campaign related data is maintained and synchronized between Oracle Marketing Cloud and your sales application thus enabling improved campaign management and reporting.

Salespeople can view meaningful information about marketing campaigns and campaign members from the Campaigns user interface. This UI provides visibility into the campaign effectiveness to support the sales processes. For example, salespeople can view the campaigns and campaign members associated with a given lead and contact to enable them gain key insights for closing a sale.

The total number responding to a campaign represents the total count of campaign members who have responded to a marketing campaign. Campaign members include either leads or contacts that were sent or responded to a marketing campaign and have a status of Responded or Sent. Note that the response is only counted once even when a campaign member has responded multiple times to the same campaign.

Salespeople can use the campaign summary data to view associated leads, contacts, opportunities, and revenue amounts. The following subject areas enable the creation of reports on the Marketing Cloud and your sales application data.

- Campaign Members
- Campaign Opportunities

For example, sales and marketing operations can run campaign related reports and perform analysis on marketing attribution and evaluate a campaign’s return on investment (ROI). The Profile subtab on the View Campaign shows some details about the campaign such as name, type and current status of the campaign. It also shows the owner, and the dates when the campaign started and ended as well as a brief description and costs of the campaign. Your administrator can use Application Composer to expose or hide such details or change the layout of the fields as they appear in the Profile subtab.
In addition, your administrator can also display a campaigns subtab on the Leads and Contacts user interface pages from where you can view data about the marketing campaigns that include the associated leads and contacts.

The Campaign Analytics subtab on the View Campaign page shows the campaign member dashboard. Your administrator can use Application Composer to expose a Campaign ROI dashboard from a side tab on the Campaign List page.

Related Topics

- Campaign Management Reports: Overview
- Enabling the Campaigns Subtab in Leads
- Enabling the Campaigns Subtab in Contacts
- Enabling the Campaign Analytics Tab in Campaigns List Page
18 Setting Up Leads

Lead Management: Overview

Lead management features help to align marketing and sales objectives from lead generation to lead execution. This ultimately contributes to increasing revenues. Lead information is generated and captured from:

- A company’s existing contacts
- Sales campaigns

All leads then undergo the qualification and assessment process and are qualified either manually by a salesperson or automatically based on predefined rules. Finally, qualified leads are converted into opportunities.

Implementation Concepts for Leads

Implementing Lead Management: Critical Choices

This topic lists some of the considerations to take into account when planning your implementation of the lead management feature. No setup tasks are mandatory for this feature. You can manage the necessary configuration, integration, and metadata settings through profile options and lookups to tailor lead management functionality to match your business requirements.

Job Roles and Associated Duty Roles

The Sales Lead Processing Duty gives access to all the underlying processing duties and processing tasks. The Sales Lead Qualification duty provides access to all underlying qualification duties and qualification tasks.

Profile Option Decision Points

Profile options are configurable options that affect application operations. The following table provides you with some decisions that you must consider and the associated profile option that you access to make the appropriate change:

<table>
<thead>
<tr>
<th>Decision Question</th>
<th>Profile Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Which assignment rules do you want to use to assign individual resources to the lead sales team?</td>
<td>Lead Assignment Mode</td>
</tr>
<tr>
<td>Assignment Rule for Rule-Based Lead Assignment</td>
<td></td>
</tr>
<tr>
<td>Which assignment rules do you want to use to assign a territory team to a lead?</td>
<td>Assignment Rule for Territory-Based Lead Assignment</td>
</tr>
<tr>
<td>Assignment Rule for Rule-Based Lead Assignment</td>
<td></td>
</tr>
<tr>
<td>Which lead ranking rules do you want to use?</td>
<td>Assignment Rule for Ranking Leads</td>
</tr>
</tbody>
</table>
### Decision Question | Profile Option
---|---
Which lead qualification rules do you want to use? | Assignment Rule for Qualifying Leads
Which leads scoring rules do you want to use? | Assignment Rule for Scoring Leads
Do you want to display the assessment tab in the Edit Lead page? | Lead Assessment Enabled
Which assessment template do you want to use for lead qualification? | Lead Assessment Template Default
Advanced Lead Qualification Enabled
Lead Qualification Template
How many days should you look back when querying leads in Search? | Lead Query Maximum Number of Days
Lead Query Default Number of Days
Lead Query Warning Threshold Number of Days
Do you want to set the maximum number of leads that can have mass update applied in one user action? | Leads Mass Update Threshold Value
Do you want users to the able to add or edit products to leads? | Add and Edit Products to Leads Enabled
Do you require additional search criteria, other than creation date, when searching across all leads, or for searches relying on hierarchy rollups? | Require Additional Criteria for Lead Search Enabled
Do you want to set context-based data security policies for improved performance of lead search? | Lead Search Context-Based Data Security Enabled

### Lookup Decision Points
Lookups enable quick selection from drop down menus. Lookups associated to lead management capabilities are incorporated into its application to speed the process of entering data into forms. You might want to change or add some of the values that are used in the lookup tables. Some of the values you can change include:

<table>
<thead>
<tr>
<th>Lookup</th>
<th>Description and Values</th>
</tr>
</thead>
</table>
| Lead Retire Reason | Possible reasons for retiring leads. Retired leads are considered closed leads. Values include:
Duplicate lead or No purchase interest Lead |
| Reject Reason | Possible reasons specified for rejecting leads. Rejected leads can be reassigned or retired. Values include: |
## Oracle Sales Cloud
### Implementing Sales
#### Chapter 18

### Setting Up Leads

<table>
<thead>
<tr>
<th>Lookup</th>
<th>Description and Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lookup</td>
<td>Duplicate lead, Failed to reach contact, and Incorrect data</td>
</tr>
<tr>
<td>Lead Time Frame</td>
<td>Lead cycle duration that usually coincides with a typical sales cycle duration for products and services offered. Values include: 3 months, 6 months, 9 months, 12 months, 15 months, and 18 months</td>
</tr>
<tr>
<td>Lead Reassignment Reason</td>
<td>Possible reasons specified for reassigning leads. Values include: No activity, Other, and Workload</td>
</tr>
<tr>
<td>Lead Rank</td>
<td>Lead rank values used as a measure of lead quality and prioritization. Values include: Cool, Hot, and Warm</td>
</tr>
<tr>
<td>Lead Source Channel</td>
<td>Source channel responsible for lead generation. Values include: Direct mail, E-mail, Fax, Marketing Cloud, Phone, Sales campaign, Sales visit, Social, Company website, Wireless message, Model-based prediction, and Rule-based prediction</td>
</tr>
</tbody>
</table>

### Related Topics
- Defining the Automatic Assignment of Lead Team Resources: Example

### How Lead Components Fit Together

A sales lead cycle ends when a lead is converted to an opportunity or when a lead is retired. A lead is retired if no possibility exists for converting the lead to an opportunity. The lead life cycle includes an automated process that captures leads and then prioritizes them for sales engagement through a scoring and ranking process. Leads are distributed to appropriate sales resources for further lead qualification, follow-up, and conversion.

### Leads Life Cycle

Leads are automatically monitored for sales representative acceptance. Unaccepted or rejected leads are reassigned as appropriate. The quality of the lead is continuously reviewed and adjusted by the lead owner at different stages of the lead life cycle. The lead owner can be a marketing resource or a sales resource, depending at what stage the lead is at in its life cycle. The lead life cycle is captured in the following sections:

- Lead Generation
- Lead Qualification
- Lead Distribution
- Lead Assessment
- Lead Conversion

### Lead Generation

Leads are generated and captured from many different sources such as:

- Campaign responses
• Third-party lead sources
• Sales prediction application through the creation of new leads

Flexible lead import, customer and contact creation, and deduplication ensure that sales lead generation efforts are optimized. For example, the lead import process checks whether leads represent new or existing customers. For new customers, data must be created for the lead. If the lead is an existing customer, then part of the lead import process checks to ensure customer and lead information isn’t duplicated.

**Lead Qualification**

Marketing departments help with the lead qualification process to ensure that only qualified leads are handed over to sales. Leads are typically ranked as Hot, Warm, or Cool. Leads are further qualified by the use of company-specific standard questions to score a lead. Lead scores are numeric values typically ranging from 1 to 100, in which a high score represents high quality.

It isn’t good practice to let stale leads build up. Standardized criteria for lead qualification ensure that quality leads reach the sales representative and help maximize the conversion rate from leads to opportunities. For example, your organization has criteria and processes for ensuring that leads are either developed or retired within 30 days. When the lead age is greater than 30 days and the rank is Warm, Marketing reassigns the leads for follow-up by an internal telemarketing group. If the leads cannot be qualified or further developed to revenue opportunities, then the rejected leads can be reassigned or can be retired manually.

**Lead Distribution**

As the qualification of leads progresses into real potential prospects, assignment manager uses expression-based rules to associate one or more internal sales representatives with each lead. If the lead is associated with either a sales prospect or a sales account, then assignment manager uses territory definitions to associate (typically one) internal territory with each lead. The sales representative newly assigned to the lead can be related to the lead record directly through the lead team or indirectly through a territory associated with the lead. The sales representatives can view and update those leads assigned to them in the lead work area and can claim ownership of the lead by accepting the lead.

Other assigned resources can view and update the lead, but they cannot make themselves the owners. If a sales prospect changes to a sales account by adding an address, assignment manager is automatically called during the next automated assignment cycle. Depending on the assignment logic, the lead can be reassigned to a different territory or sales resource. If the assigned sales representative takes no action on a lead for several days, then the lead can be manually reassigned to another sales representative.

**Lead Assessment**

Sales representatives must evaluate the quality of the information that they have received for the lead. They determine whether the details are sufficient to reach out to the customer and assess whether a lead is worth pursuing with the help of preconfigured assessment templates. Assessment templates can qualify the lead by:

• Reviewing the content shared with the customer during a campaign
• Framing the lead in the context of the campaign
• Ensuring the salesperson understands the information that has already been sent to the customer

You use the lead assessment feature to assess leads. Predefined questions help determine the likelihood of the lead being accepted by Sales. For example, you’re a sales representative and you ask the customer a series of questions created by Marketing and Sales to assess the quality of the lead. You record the answer of each question and the lead assessment tool automatically factors the answer into the assessment score of the lead. At the end of the call, you note that the assessment lead score is high, so you request that the lead is assigned to the direct sales team. If the lead score was low, then you might want to retire the lead. If the lead needs qualifying, then you can decide to leave it in your list of leads for follow-up. Finally, if
the lead is good, but the potential revenue opportunity is less than a predetermined monetary amount, for example, twenty-five thousand dollars, then you can convert the lead to an opportunity to pursue as part of the sales cycle.

Lead Conversion
After establishing that the lead has potential, the sales representative can convert the lead to an opportunity. You can schedule meetings and presentations with your lead contact to move the opportunity along the sales pipeline. To track the progress of the lead, you can capture contact notes and associate them with the contact and opportunity. As the lead progresses through its life cycle, decisions to retire the lead are based on the following:

- You cannot verify the customer and lead details.
- The customer isn’t interested in pursuing the lead any further.

Sales Lead Profile Options: Explained
Profile options are configurable options that affect application operations. Values defined at the user level take precedence over those at the site level. If a value is not defined at the user level, the site level value is used.

The effect of setting each of the sales leads profile options are described under the following broad sections:

- Lead Assignment
- Lead Qualification and Assessment
- Lead Update and Attribute Mapping
- Partner Leads and Deal Registrations
- Lead Searches

Lead Assignment
The following table lists the profile options that affect the assignment of lead status, rank, score, resources, and territories on the lead. Before setting these profile options, you must perform the tasks listed under Configure Assignment Manager for Lead Processing setup task. From there you can review and update assignment of candidate objects such as rank, qualification status, and resources to leads.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment Rule for Qualifying Leads</td>
<td>Specify the rule to evaluate the lead and assign the lead status per rule conditions.</td>
</tr>
<tr>
<td>Assignment Rule for Ranking Leads</td>
<td>Specify the rule to evaluate the lead and assign the lead rank per rule conditions.</td>
</tr>
<tr>
<td>Assignment Rule for Rule-Based Lead Assignment</td>
<td>Specify the rule to evaluate the lead and assign the sale team resources per rule conditions.</td>
</tr>
<tr>
<td>Assignment Rule for Scoring Leads</td>
<td>Specify the rule to evaluate the lead and assign a score per rule conditions.</td>
</tr>
<tr>
<td>Assignment Rule for Territory-Based Lead Assignment</td>
<td>Specify the rule to evaluate the lead and further filter territories derived using territory-based assignment per rule conditions.</td>
</tr>
<tr>
<td>Lead Assignment Mode</td>
<td>Specify the default assignment mode type allowed during on-demand or automatic lead assignment. On-demand assignment occurs when you select the assign lead action in the UI.</td>
</tr>
</tbody>
</table>
Profile Option Display Name | Effect
--- | ---
Lead Batch Reassignment | Enable batch lead reassignment, in addition to lead automatic reassignment.

### Lead Qualification and Assessment

The following table lists the profile options that affect the qualification and assessment of leads. Before setting these profile options, you must perform the tasks listed under Configure Assessment Reference Data for Leads setup task. From there you define and manage the setup for configuring templates used for assessing and qualifying sales objects.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Assessment Enabled</td>
<td>Enable the display of Qualification, a tab containing the sets of predefined questions and answers collected to assist in evaluating the lead.</td>
</tr>
<tr>
<td>Lead Assessment Template Default</td>
<td>Specify the assessment template questionnaire to use when creating a lead assessment.</td>
</tr>
<tr>
<td>Advanced Lead Qualification Enabled</td>
<td>Enable advanced lead qualification by specifying the template name to display the collection of questions, possible answers, and questionnaire feedback.</td>
</tr>
<tr>
<td>Lead Qualification Template</td>
<td>Specify the assessment template to use for evaluating and qualifying leads.</td>
</tr>
<tr>
<td>Enable Multiple Assessments Per Qualification Template</td>
<td>Enable the ability to perform multiple qualifications for the same lead qualification template by setting the value to Yes. This setting is not enabled by default.</td>
</tr>
</tbody>
</table>

### Lead Update and Attribute Mapping

The following table lists the profile options that affect the update of leads and lead-to-opportunity attribute mapping.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leads Mass Update Threshold Value</td>
<td>Specify the maximum number of leads that can be updated at once in one user action.</td>
</tr>
<tr>
<td>Add and Edit Products to Leads Enabled</td>
<td>Enable the ability to add or edit products to leads. The ability to add or edit product groups to leads is enabled by default.</td>
</tr>
<tr>
<td>Use Default Lead Notification Process</td>
<td>Specify whether default lead notification business process should be used. Set Yes for default process, and No for user-defined process or if no notification is intended.</td>
</tr>
<tr>
<td>Create Account and Contact from Lead</td>
<td>Enable the default setting for the creation of an account, a contact, both an account and a contact, or none during lead conversion. The default value is to create both.</td>
</tr>
<tr>
<td>Direct Lead to Opportunity Mapping</td>
<td>Specify the mapping file name created in Application Composer, Copy Maps. This file is used to map objects and attributes when a direct lead is converted to an opportunity.</td>
</tr>
<tr>
<td>Lead to Account Mapping</td>
<td>Specify the mapping file name created in Copy Maps. This file maps objects and attributes during the creation of an account when converting a lead to an opportunity.</td>
</tr>
</tbody>
</table>
### Partner Leads and Deal Registrations

The following table lists the profile options that affect sales partner leads, deal registrations and deal assignments.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner Contact Addition Enabled</td>
<td>Specify whether to automatically add the primary partner contact to the lead team when a partner contact is added to the lead. The default value is Y.</td>
</tr>
<tr>
<td>Lead Registration Approval Administrator</td>
<td>Select the recipient of notifications when an approver cannot be determined, who is qualified to respond to the notification, and can modify approval configurations.</td>
</tr>
<tr>
<td>Lead Registration Expiration Date</td>
<td>Specify the number of days, after the lead registration creation date, used to derive the lead registration expiration date.</td>
</tr>
<tr>
<td>Resource Sales Team Access Level Default for Deal Registration</td>
<td>Specify the default access level for resources added to the deal registration sales team.</td>
</tr>
<tr>
<td>Deal Registration Query Default Number of Days</td>
<td>Specify the default number of days used to derive the last updated date range when searching for deal registrations.</td>
</tr>
<tr>
<td>Partner Lead to Opportunity Mapping</td>
<td>Specify the mapping file name created in Application Composer, Copy Maps. This file is used to map objects and attributes when a partner lead is converted to an opportunity.</td>
</tr>
<tr>
<td>Deal Registration to Opportunity Mapping</td>
<td>Specify the mapping file name to be used to copy attributes while converting a Deal Registration to an Opportunity.</td>
</tr>
<tr>
<td>Assignment Rule for Rule-Based Deal Assignment</td>
<td>Specify the assignment rule that assigns resources to deal registrations. Resource members are added to the deal registration team.</td>
</tr>
<tr>
<td>Assignment Rule for Territory-Based Deal Assignment</td>
<td>Specify the assignment rule that assigns territories to Deal Registrations. Territory members are added to the deal registration team.</td>
</tr>
<tr>
<td>Deal Registration Assignment Mode</td>
<td>Specify the default assignment mode used during deal registration assignment. The mode is set to rule-based assignment mode.</td>
</tr>
<tr>
<td>Advanced Lead Qualification Enabled - Indirect Leads</td>
<td>Specify a default template to enable lead qualification for partner sales channel and display questions, possible answers, and questionnaire feedback in the Edit Lead user interface.</td>
</tr>
<tr>
<td>Days Prior to Deal Registration Expiration</td>
<td>Specify the number of days prior to expiration that deal registrations must be included in the predefined saved search. 30 days is the default value.</td>
</tr>
</tbody>
</table>
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**Setting Up Leads**

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deal Registration Default Approver</td>
<td>Select the recipient of notifications when an approver cannot be determined, who is qualified to respond to the notification, and can approve deal registrations.</td>
</tr>
<tr>
<td>Use Default Deal Registration Approval Business Process</td>
<td>Specify whether the default deal registration approval business process should be used. The default value is set to Y. Set to No for customer-defined processes.</td>
</tr>
</tbody>
</table>

**Lead Searches**

The following table lists the profile options used to manage sales lead searches.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Query Maximum Number of Days</td>
<td>Specify the maximum number of days allowed when searching leads based on the creation date range.</td>
</tr>
</tbody>
</table>

The value for the maximum number of days must be a positive number. If the value is not a positive number or left blank, the value of 360 days is used.

| Lead Query Default Number of Days             | Specify the default number of days used to derive the creation date range for searching leads. The search criterion is derived by using the current date for the creation end date value and the profile option to derive the creation start date value. |

For example, if you want leads for the last 15 days to be the default query action, then set the profile value to 15. The default creation date search criteria will have an end date for the current date and the start date will be 15 days prior to the current date. The values can be overridden in the search criteria.

The value for the default number of days must be a positive number. If the value is not a positive number or left blank, the value of 30 days is used.

This profile option can be defined at both the site and user levels.

| Lead Query Warning Threshold Number of Days   | Specify the number of days for the lead creation date search criteria before issuing an alert to the user. |

To disable the warning, delete the profile option value.

| Lead Search Context-Based Data Security Enabled | Enable context-based data security policies for improved performance of lead search. The default value is set to N. |

| Require Additional Criteria for Lead Search Enabled | Enable additional search criteria, other than creation date, when searching across all leads, or for searches relying on hierarchy rollups. |

**Related Topics**

- Profile Options for Sales Campaigns: Explained
- Scheduling Lead Processing Activities: Overview
Sales Lead Lookups: Explained

Lookups enable quick selection from drop-down lists and are incorporated into the lead management capability to speed the process of entering data into forms. They are also used in applications to represent a set of codes and their translated meanings. For example, a product team might store the values 'Y' and 'N' in a column in a table. When displaying those values they would want to display "Yes" or "No" (or their translated equivalents) instead. Each set of related codes is identified as a lookup type.

Lead Lookups

Lookup types are classified using tasks that involve a group of related lookups, such as Manage Sales Leads Standard Lookups. Each task gives you access only to certain lookup types. Use the Manage Sales Lead Standard Lookups task from the Setup and Maintenance work area to access the lookup types related to leads. Generic tasks provide access to all lookup types of a kind, such as all common lookups that are associated with the Manage Common Lookups task.

Note: If the lookups in an application are available in the standards, common, or set-enabled lookups view, they are central to an application and can be easily managed. However, lookups defined in a specific application view can only be managed by following instructions provided by that application.

The following table displays lead lookup names (called lookup types in the application), the values, and the descriptions

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Lookup Values</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Access Level</td>
<td>• Full</td>
<td>Specifies the access level of team members for actions they can perform on specific sales leads. Full access level allows the user to update the team by adding or removing individual resources or by updating the access level for any member.</td>
</tr>
<tr>
<td></td>
<td>• View only</td>
<td></td>
</tr>
<tr>
<td>Lead Acceptance Status</td>
<td>• No</td>
<td>Status that indicates whether or not a lead is accepted by sales departments.</td>
</tr>
<tr>
<td></td>
<td>• Yes</td>
<td></td>
</tr>
<tr>
<td>Lead Assignment Mode</td>
<td>• Both</td>
<td>Determines whether lead assignment is based on rule-based, territory-based, or both types of rules.</td>
</tr>
<tr>
<td></td>
<td>• Rule-based assignment</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Territory-based assignment</td>
<td></td>
</tr>
<tr>
<td>Lead Assignment Process Type</td>
<td>• Assignment</td>
<td>Lead processing types supported by Assignment Manager.</td>
</tr>
<tr>
<td></td>
<td>• Qualification</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Ranking</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Scoring</td>
<td></td>
</tr>
<tr>
<td>Lead Assignment Status</td>
<td>• Assigned</td>
<td>Assignment status indicating whether sales team resources are assigned.</td>
</tr>
<tr>
<td></td>
<td>• Reassigned</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Rejected</td>
<td></td>
</tr>
<tr>
<td>Lead Display in Simplified Pages</td>
<td>• Leads</td>
<td>Enable the display of leads in the simplified pages dashboard.</td>
</tr>
<tr>
<td>Lookup Type</td>
<td>Lookup Values</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>---------------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| Lead Processing Activity Progress Status | • Completed  
• Completed with error  
• New  
• In progress  
• Scheduled | Progress details indicating lead current and end processing status. |
| Lead Processing Activity Schedule Mode | • Immediate  
• Schedule date  
• Repeats | Scheduling options for lead processing activities. |
| Lead Processing Repeat Frequency | • Days  
• Months  
• Weeks  
• Years | The time intervals between lead processing activities. |
| Lead Process Scheduling Operators | • Equal to  
• Greater than  
• Greater than or equal to  
• Less than  
• Less than or equal to | Operators used for lead processing scheduling options. |
| Lead Reassignment Status | • N  
• R  
• T  
• Y | Reassignment status values for leads reassigned only by Territory Based Assignment or Resource Based Assignment jobs.  
The Reassign indicator is set to:  
• N when lead is processed by Lead Assignment Job  
• R when Lead Resource Based Assignment is completed by Lead Assignment Job  
• T when Lead Territory Based Assignment is completed by Lead Assignment Job  
• Y for processing lead in Lead Assignment Job |
| Lead Registration Approval Status | • Approved  
• Pending approval  
• Rejected  
• Submitted | Approval status for leads registered by partners. |
| Lead Registered Status | • No  
• Yes | Status that indicates whether or not a partner lead is registered. |
| Lead Search Filter Record Sets | • All records I can see  
• Records in my territory hierarchy  
• Records in my territory  
• Records I own  
• Records where I am on the team | Record visibility filters for lead search. |
### Lookup Type
- **Lead Qualification Budget Status**
  - Approved
  - Pending
  - Unknown
  - Description: The approval status of a customer budget. The data is used to assess the lead qualification status.

- **Lead Rank**
  - Cold
  - Hot
  - Warm
  - Description: Lead rank values used as a measure of lead quality and prioritization.

- **Lead Reassignment Reason**
  - No activity
  - Other
  - Workload
  - Possible reasons specified for reassigning leads.

- **Lead Reject Reason**
  - Duplicate lead
  - Failed to reach contact
  - Incorrect data
  - Possible reasons specified for rejecting leads. Rejected leads can be reassigned or retired.

- **Lead Retire Reason**
  - Duplicate lead
  - No purchase interest
  - Possible reasons for retiring leads. Retired leads are considered closed leads.

- **Lead Registration Type**
  - Co-sell
  - Referral
  - Resale
  - Types of leads available for partners.

- **Lead Source Channel**
  - Direct mail
  - E-Mail
  - Fax
  - Marketing Cloud
  - Phone
  - Source channel responsible for lead generation.
### Deal Registration Lookups

The following table displays deal registration lookup names (called lookup types in the application), the values, and the descriptions.

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Lookup Values</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deal Registration Access Level</td>
<td>• Edit</td>
<td>Specifies the access level of team members for actions they can perform on deal registrations.</td>
</tr>
<tr>
<td></td>
<td>• Full</td>
<td>Full access level allows the user to update the team by adding or removing individual resources or by updating the access level for any member.</td>
</tr>
<tr>
<td></td>
<td>• View only</td>
<td></td>
</tr>
<tr>
<td>Deal Registration Assignment Mode</td>
<td>• Both</td>
<td>Determines whether deal registration assignment is rule-based, territory-based, or a combination of the two.</td>
</tr>
<tr>
<td></td>
<td>• Rule-based Assignment Only</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Territory-based Assignment Only</td>
<td></td>
</tr>
<tr>
<td>Deal Registration Reject Reason</td>
<td>• Duplicate</td>
<td>Possible reasons for rejecting a deal registration request.</td>
</tr>
<tr>
<td></td>
<td>• Ineligible Customer</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Ineligible Partner</td>
<td></td>
</tr>
<tr>
<td>Deal Registration Return Reason</td>
<td>• Incomplete Customer Information</td>
<td>Possible reasons for returning a submitted deal registration.</td>
</tr>
<tr>
<td></td>
<td>• Ineligible Product</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Insufficient Quantity</td>
<td></td>
</tr>
<tr>
<td>Deal Registration Search Filter Record</td>
<td>• All records I can see</td>
<td>Specifies record visibility filters for deal registration search.</td>
</tr>
<tr>
<td></td>
<td>• Records I own</td>
<td></td>
</tr>
<tr>
<td>Deal Registration Status</td>
<td>• Approval</td>
<td>Deal registration status values based on specific actions performed on deals registered by partners. Used to mark the milestones in the deal registration life cycle.</td>
</tr>
<tr>
<td></td>
<td>• Draft</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Expired</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Pending Approval</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Rejected</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Returned</td>
<td></td>
</tr>
</tbody>
</table>

### Lead Time Frame

- 3 months
- 6 months
- 9 months
- 12 months
- 15 months
- 18 months

Lead cycle duration that usually coincides with a typical sales cycle duration for products and services offered.
Lead Qualification Templates

Sales Lead Qualification Templates: Explained

Lead qualification templates enable a uniform lead-qualification process across leads. This topic provides an overview of how you can assign and use the templates as part of the lead qualification process. Using lead qualification templates, you can:

- Define lead qualification templates
- Assign lead qualification templates
- Gather lead quality information
- Enable multiple assessments per lead qualification template

Define Lead Qualification Templates

Qualification templates are collections of questions and answers that can be weighted and scored to evaluate the quality of gathered information about the sales lead. You use the templates to define consistent and specific qualification criteria for leads.

Assign Lead Qualification Templates

Once the qualification template is defined, you assign the template to the Lead Qualification Template profile available from the Manage Sales Lead Administrator Profile Values page. You can define more than one qualification template by assigning templates at the site level profile.

Gather Lead Quality Information

Along with other key qualification fields available in the lead, the qualification template questions are displayed on the lead Qualification tab if you have enabled the Advanced Lead Qualification profile option. Lead qualification is typically conducted through phone conversations. As you enter responses for the qualification questions, the qualification template’s weighted score is calculated and a progress bar provides immediate rating and feedback.

Enable Multiple Assessments Per Lead Qualification Template

To enable sales representatives to perform multiple assessments per qualification template, you set the profile option Enable Multiple Assessments Per Qualification Template to Yes.
Defining a Sales Lead Qualification Template: Example

This topic provides an example that illustrates defining a lead qualification template to assess the basic quality of a lead.

**Scenario**

Your company sells alternative energy solutions to small businesses. The company employs a group of people that:

- Qualify the basic information about a lead
- Gather the necessary information required by the sales team to prepare for follow-up sales calls

Unqualified leads are generated from various sources and captures when customers have requested more information from your Web site. Before creating the qualification template, your company evaluates the following:

- Compile a set of questions that each lead qualifier is expected to ask so as to:
  - Verify the customer’s intent in requesting more information
  - Ensure a consistent and thorough communication with the customer

- Categorize a set of responses to help identify what leads to transfer to the sales team.
  
  For example, once the initial lead information is gathered, only leads with a greater potential for a sale are transferred to the sales team. The level of response assists the lead qualifier identify those leads with the greatest sales potential.

To ensure the full range of possible responses, the qualification information is categorized into four basic response levels:

- Very little information was obtained from the customer
- A high potential of the customer working on an alternative energy project
- Not applicable
- Information not available

- Perform analysis of your qualification template and model the set of question responses and questions

Question responses and questions are analyzed and modeled to effectively place the weighted score ranges into the four categories. For example, a budget that expires less than ten days may score low if the average sales cycle is greater than 10 days. However, any answer to a budgeting question has higher weight in the overall questionnaire than a question about the customer’s project team. If a qualification template’s weighted score is 90 or above, the customer is categorized as a high potential for an energy project. Such a lead is transferred to a sales resource to pursue.

**Defining the Qualification Template**

Navigate to the Manage Assessment Templates page from the Manage Sales Lead Qualification Template implementation task. The following categories of qualification levels are entered as ratings of:

- Little Information Available
- Low Project Potential
• Medium Project Potential
• High Project Potential

Questions about the customer's budget, time frame, decision maker, and project drive the sale potential and resulting lead rank. These questions are not included in the qualification template because the lead qualifier enters those directly in the Lead UI.

Analysis

Use the qualification template to effectively evaluate the customer’s project and prepare the sales team to progress the lead once the lead is qualified.

• Enter a set of questions and responses to qualify the time frame including what phase the customer’s implementation project is in.
• Gather information to meet export policies. For example, add questions about implementation projects outside of the country.
• Add questions to determine if and when a customer’s budget is due to expire.
• Identify competition by adding questions and responses about competing suppliers or in-house solutions and satisfaction levels.
• Allow a free-form response to enable the lead qualifier to capture specific customer comments about their greatest issue they are trying to solve.

Next, the weighed scores ranges are assigned to the four ratings. To provide a visual queue and feedback to the lead qualifier to guide them in their decision to update the lead as qualified, a color and feedback phrase is entered for the four ratings. The color-coded bar, score, and feedback appear at the top of each qualification questionnaire in the lead.

Lead Qualification Template Profile

Once the qualification template is defined, the template is assigned to the Lead Qualification Template profile available from the Manage Sales Lead Administrator Profile Values implementation task. Since there is only one business unit for your Company and only one qualification template, the template is assigned at the profile Site level.

As your company continues to grow into a global company with a broader set of business units and products, Qualification templates are created in different languages and assigned to business unit sets. The appropriate qualification template is assigned to corresponding lead qualification users through the Lead Qualification Template profile.

Note: The Advanced Lead Qualification Enabled profile option must be set so that you can specify the template name to use. The template displays the collection of questions, possible answers, and questionnaire feedback in the Edit Lead UI.

Assets Integration

Enabling the Leads Subtab in Assets

You can expose the Leads subtab list in the Edit Assets page to give salespeople the ability to associate an asset with a lead. You must expose asset fields on the Lead pages to display the asset information for the lead. By default, the Leads subtab does not appear in the Assets pages.
Use the following steps to expose the Leads subtab list in the Edit Assets page.

1. Sign in as a sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to Application Composer, in the Configuration category.
4. Select Sales.
5. In the navigation tree, expand Standard Objects, expand Asset, and click Pages.
6. Ensure that the Simplified Pages tab is selected.
7. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the Duplicate icon.
8. Type a new layout name and click Save and Edit.
   The Details Layout page appears.
9. In the Subtabs Region, click the Hide, Show, or Reorder Subtabs icon.
   The Configure Subtabs dialog box appears.
10. Move Leads from the Available Subtabs to the Selected Subtabs window.
11. Click OK.
12. Back in the Details Layout page, click Done.
13. Be sure that the layout status for your user-defined layout is Active.
14. Test the changes: Navigate to Sales > Assets as a user with access to the assets pages, for example, as a salesperson. Edit an asset and ensure you can see the Leads subtab in the Edit Asset page.
15. Publish the sandbox.

For more information, see the Extending Sales guide.

Related Topics

- Setting Up Sales Assets: Overview
- Sales Assets: Overview
- Enabling the Opportunities Subtab in Assets

Creating Partner Task Templates: Explained

A task template is a group of tasks associated with a business object, such as Partners. Users with the Customer Relationship Management Application Administrator or Application Implementation Consultant job roles can use the Manage Partner Task Template setup task to create task templates for partners. Channel managers and partner administrators can then use these templates to quickly create multiple tasks with a single click. The tasks generated from the template are accessible to users in the Activities subtab on Partner pages.

By default, this feature is hidden, however sales administrators can use Application Composer to expose a 'smart' Create Task button on the Embedded task list of the Activity object. When a valid task template has been created, a Create Tasks from a Template option is available from the Create Task button. If no valid task templates have been created, then the Create Task button functions as it always has.

The process of creating task templates and making them available to channel managers and partner administrators involves the following:

1. Create the task template and create the individual tasks for the template.
2. Expose the 'smart' Create Task button on the Embedded task list of the Activity object.

Creating a Partner Task Template

Users with the Customer Relationship Management Application Administrator or Application Implementation Consultant job roles can use these steps to create task templates for partners.

1. Sign in with your Customer Relationship Management Application Administrator or Application Implementation Consultant credentials.
2. Navigate to the Sales offering in Setup and Maintenance.
3. Search for and select the Manage Partner Task Template setup task.
4. On the Manage Partner Task Template page, click the Create icon.
5. On the Create Template pop-up, provide information in the following fields:

The following table lists the fields available on the Create Template pop-up and provides a description for each field.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Template Name</td>
<td>Enter the name of the template.</td>
</tr>
<tr>
<td>Description Template Set</td>
<td>Enter a brief description about the template name, if required.</td>
</tr>
<tr>
<td>Active</td>
<td>Selecting this check box indicates that the template is active. The check box is selected by default.</td>
</tr>
<tr>
<td>Template Type</td>
<td>The business object to which the task template is associated is set as default. For partner task templates, the template type is Partner Profile.</td>
</tr>
<tr>
<td>Subtype</td>
<td>The default value is blank. If you want to create a task template for assessment you must select Assessment. Otherwise, leave the field blank.</td>
</tr>
<tr>
<td>Template Set</td>
<td>Select the template set (Set ID) that you want to associate with your business unit.</td>
</tr>
</tbody>
</table>

6. On the Create Template pop-up, click OK.
7. To create tasks for the task template, click the Create icon in the Details section.
8. On the Create Task pop-up, provide information in the following fields:

The following table lists the fields available on the Create Task pop-up and provides a description for each field.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>Provide a subject for the task.</td>
</tr>
<tr>
<td>Description</td>
<td>(Optional) Describe the task.</td>
</tr>
<tr>
<td>Lead Time</td>
<td>(Optional) Enter the lead time for the task.</td>
</tr>
<tr>
<td>Type</td>
<td>(Optional) Select a type for the task.</td>
</tr>
<tr>
<td>Template Duration</td>
<td>(Optional) Define the due date for the task. The due date is calculated based on the template duration value and the task start date.</td>
</tr>
</tbody>
</table>
### Field | Description
--- | ---
If the duration is blank in the template task, the task is created without a due date.

Priority | (Optional) Select a priority for the task.

9. On the Create Task pop-up, click **OK**.
10. Click **Save and Close** to save your work

**Adding the Smart Create Task Button to Activity Pages**

Use these steps to replace the Create Task button with the 'smart' Create Task button on Activity pages.

1. Sign in with your Sales Administrator credentials.
2. Ensure you are in a sandbox.
3. From the Navigator, click Application Composer.
4. From the list of Standard objects, expand Activity.
5. Click the **Pages** link.
6. In the Activity Pages list, scroll down to the Embedded Task List Overview page.
7. Duplicate the standard layout and click **Create and Edit**.
8. On the Edit Layout page for your duplicate layout, click the **Edit** icon for the Embedded Task List Overview Table.
9. In the Configure Detail Form: Buttons and Actions area, move the Create Task + Create Task From Template button from the Available Buttons column to the Selected Buttons column.
10. In the Configure Detail Form: Buttons and Actions area, move the Create Task button from the Selected Buttons column to the Available Buttons column.
11. Click **Save and Close** and click **Done** to save your work.
12. Publish your sandbox.

**Copy Maps**

**Enabling a User-Defined Copy Lead To Opportunity Map Value**

Copy map functionality lets users create objects by copying existing objects. After you specify the lead-to-opportunity copy map template in a profile option, sales users can copy notes, attachments, and activities from a lead record to an opportunity record during the lead-to-opportunity conversion.

The following sections describe how to access the Direct Lead to Opportunity Mapping profile option and how you can specify your own user-defined mapping files.

- Setting Your Copy Lead To Opportunity Map Value
- Profile Options for Copy Maps

**Setting Your Copy Lead To Opportunity Map Value**

You can specify the mapping file name to use when copying an opportunity by setting the Direct Lead to Opportunity Mapping profile option. The predefined file is used to specify the mapping file name created when you convert your lead to an opportunity.
Use the following procedure to access and modify the value set in the Direct Lead to Opportunity Mapping profile option:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Leads
   - Task: Manage Sales Lead Administrator Profile Values

2. On the Manage Sales Lead Administrator Profile Values page, enter Direct Lead to Opportunity Mapping in the **Profile Display Name** field.

   **Note:** For partner leads, use the Partner Lead to Opportunity Mapping profile option.

3. Click **Search**.

4. In the Profile Values section, the predefined mapping, called **Copy Lead To Opportunity Map**, appears in the **Profile Value** field.

5. Remove the **Copy Lead To Opportunity Map** value and enter the value for your user-defined mapping file, for example **My Copy Lead To Opportunity Map**.

6. Click **Save and Close**.

See the topic Modifying Lead Convert and Mass Lead Convert Pages in the Extending Sales guide.

### Profile Options for Copy Maps

As an administrator, you can specify your own copy maps to use for mapping objects and attributes during the lead to opportunity conversion process. For example, you can create user-defined lead and opportunity attributes in Application Composer and can then add these attributes to the copy maps. Oracle recommends that you duplicate an existing copy map and make the changes in the copy. You must save the user-defined copy map using a unique name and then specify the name of the saved copy map in one of the following profile options:

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Lead to Opportunity Mapping</td>
<td>Specify the mapping file name created in Application Composer, Copy Maps. This file is used to map objects and attributes when a direct lead is converted to an opportunity. The predefined value is Copy Lead to Opportunity.</td>
</tr>
<tr>
<td>Lead to Account Mapping</td>
<td>Specify the mapping file name created in Application Composer, Copy Maps. This file is used to map objects and attributes during the creation of an account when converting a lead to an opportunity.</td>
</tr>
<tr>
<td>Lead to Contact Mapping</td>
<td>Specify the mapping file name created in Application Composer, Copy Maps. This file is used to map objects and attributes during the creation of a contact when converting a lead to an opportunity.</td>
</tr>
<tr>
<td>Partner Lead to Opportunity Mapping</td>
<td>Specify the mapping file name created in Application Composer, Copy Maps. This file is used to map objects and attributes when a partner Lead is converted to an Opportunity. The predefined value is Copy Lead to Opportunity.</td>
</tr>
</tbody>
</table>

See the topic Modifying the Lead to Opportunity Copy Map: Worked Example in the Extending Sales guide.

**Related Topics**

- Modifying Lead Convert and Mass Lead Convert Pages
Copying Leads to Accounts and Contacts: Explained

Copy maps enable you to create new objects by copying existing objects. For example, you can copy lead attributes stored on a lead to the account or contact created during lead conversion. You use the copy maps feature to map child objects and attributes in the source object (From object) to objects and attributes in the object you are creating (To object).

Predefined mapping files are available to you as part of your sales application to enable you to:

- Map objects and attributes during the creation of an account when converting a lead to an opportunity.
- Map objects and attributes during the creation of a contact when converting a lead to an opportunity.

Creating a Lead to Account Map

Do the following to create a lead to an account map:

1. Sign in as a user with Application Composer access and verify that you have an active sandbox.
2. Access Application Composer by selecting **Application Composer** from the **Navigator** menu, under the **Configuration** category.
3. Select **Sales** to filter the object search, and under **Advanced Setup**, select **Copy Maps**.
4. On the Copy Maps page, select the **Copy Lead to Account > Standard Copy Lead to Account Map**.
5. Create a copy of the map and enter relevant account mappings on the Edit Copy Map page.
6. Click **Save and Close**.
7. Specify the mapping file name in the following profile option:
   - Use the **Lead to Account Mapping** (MKL_LEAD_TO_ACCOUNT_MAPPING_NAME) profile option to specify the mapping file name created in Copy Maps. This file maps objects and attributes during the creation of an account when converting a lead to an opportunity.

Creating a Lead to Contact Map

Do the following to create a lead to a contact map:

1. Sign in as a user with Application Composer access and verify that you have an active sandbox.
2. Access Application Composer by selecting **Application Composer** from the **Navigator** menu, under the **Configuration** category.
3. Select **Sales** to filter the object search, and under **Advanced Setup**, select **Copy Maps**.
4. On the Copy Maps page, select the **Copy Lead to Contact > Standard Copy Lead to Contact Map**.
5. Create a copy of the map and enter relevant account mappings on the Edit Copy Map page.
6. Click **Save and Close**.
7. Specify the mapping file name in the following profile option:
   - Use the **Lead to Contact Mapping** (MKL_LEAD_TO_CONTACT_MAPPING_NAME) profile option to specify the mapping file name created in Copy Maps. This file maps objects and attributes during the creation of a contact when converting a lead to an opportunity.

Related Topics

- Creating a Copy Map: Procedure
- Modifying the Lead to Opportunity Copy Map: Worked Example
Chapter 19
Setting Up Opportunities

Opportunities: Overview

Opportunities allow organizations to support the full sales process, from leads, to opportunities, to sales, to follow-up analytics. Within opportunities, sales organizations can capture a wide variety of information related to an opportunity, such as customer (account) and the products to be sold. They can use the supplied sales methods and sales stages to step the opportunity to its eventual conclusion.

In addition, account intelligence, sales actions, and historical sales analysis further enable salespeople to increase their win rates by offering data-driven pipeline management and recommendations for the next best sales action. For example, setting win probability variance thresholds and providing multiple recommendations per opportunity enables sales representatives to optimize their sales opportunities.

The following table lists opportunity features.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support the sales life cycle</td>
<td>Create, manage, and close opportunities, supporting the entire sales life cycle. By integrating with leads, you can convert leads to opportunities. Post-sale, take advantage of supplied business intelligence reports related to sales.</td>
</tr>
<tr>
<td>Maintain opportunity information</td>
<td>Following are just some of the data that sales teams can capture for an opportunity:</td>
</tr>
<tr>
<td></td>
<td>• Accounts: You can associate an account (for example, a customer or prospect) with the opportunity.</td>
</tr>
<tr>
<td></td>
<td>• Opportunity owner: The person who creates an opportunity is automatically assigned ownership. You can change owner if needed.</td>
</tr>
<tr>
<td></td>
<td>• Contacts: You can associate contacts with an opportunity. In addition, you can specify a contact’s role, affinity, and influence level on an opportunity. A single contact can be marked as primary.</td>
</tr>
<tr>
<td></td>
<td>• Currency: The application supports multiple currencies at both the opportunity header and revenue-line levels.</td>
</tr>
<tr>
<td></td>
<td>• Budget: A Budgeted indicator lets you display whether the opportunity revenue amount has been budgeted by the customer, as well as the date that the budget was made available.</td>
</tr>
<tr>
<td></td>
<td>• Competitors and partners: You can associate partners and competitors with opportunities, both at the opportunity and revenue line levels.</td>
</tr>
<tr>
<td></td>
<td>• Marketing data: The Source field allows the association of sales campaigns with an opportunity.</td>
</tr>
<tr>
<td></td>
<td>• Mass update opportunities: Allow sales personnel to update several opportunity attributes at once on multiple opportunities.</td>
</tr>
<tr>
<td>Employ sales methodology</td>
<td>Your company can employ its own sales methodology by using the supplied sales methods and stages. For each sales stage, administrators can create action items (process steps), task templates, recommended documents, assessment templates, and required fields for use in opportunities. In addition, administrators can specify a different default win probability percentage for each sales stage.</td>
</tr>
<tr>
<td>Use Sales Coach for guided selling</td>
<td>Sales Coach, part of sales methods, guides salespeople through each step of the sales cycle with an organization’s own sales methodology and best practices. The action items (process steps), task templates, recommended documents, assessment templates, and mandatory fields set up by your</td>
</tr>
</tbody>
</table>
### Chapter 19

## Setting Up Opportunities

<table>
<thead>
<tr>
<th>Feature</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leveraging the product revenue model</td>
<td>Opportunities support a product revenue model that features revenue-based forecasting, products and product groups, recurring revenue, and revenue data captured at the line level, such as win probability, close date, include in forecast, and status.</td>
</tr>
<tr>
<td>Supporting recommended actions</td>
<td>Prompts salespeople to respond to the next best set of recommended actions for customer engagement, drive pipeline and determine how often to reach out to customers post sales.</td>
</tr>
</tbody>
</table>

The following lists some of the benefits of the next best sales action feature:

- Support multiple recommendations per opportunity.
- Enables smarter sales experiences and optimizes the selling process.
- Provides a percentage win probability in comparison to other opportunities from your sales organization or a prediction about the close date of the opportunity. For example, based on historical data, the likelihood to close an opportunity is less than 40%.
- Supports user feedback per opportunity.
- Enables administrative and supervisory controls. For example, manage the win probability variance thresholds for opportunities and define user actions to suit the organization’s requirements. As salespeople update the opportunity information, win likelihood and recommended actions are regenerated. |

| Assign sales team | Opportunities align with territories and the assignment engine for rule-based or territory-based autoassignment of salespeople to opportunities. In the team pages, you also can manually add sales team members to an opportunity. |
| Allocate sales credit | By allocating sales credit to salespeople on product lines, you can capture the amount of credit salespeople receive for the sale. You can track direct, channel, and overlay resources and their contributions using revenue and nonrevenue credit splits. |
| Use forecast territories on product lines | By integrating with forecasting, you can use forecast criteria to automatically include product-line revenue in the forecast. You can leave the default forecast territory on the product lines or assign another forecast territory. The forecast is refreshed in real-time from revenue when an opportunity is created or updated. |
| Assess opportunities and their products, contacts, and competitors | You can use assessments to evaluate the health of an opportunity or an opportunity product, contact, or competitor. After setup by the administrator, assessments are available to salespeople in the Assessments tab. |
| View business intelligence reports | Several supplied business intelligence reports give you views into sales metrics, from lists of opportunities and accounts, to pipeline data, sales team performance, and other revenue metrics. |

**Related Topics**

- [Opportunity Products and Revenue: Overview](#)
- [Sales Credits: Overview](#)
- [Sales Prediction: Overview](#)
Sales Methods, Sales Stages, and Sales Coach

Sales Methods, Sales Stages, and Sales Coach: Overview

You can use sales methods and sales stages to employ the sales methodology that best aligns with an opportunity. Use Sales Coach, which administrators set up within sales stages, as both a teaching tool and a method to make your organization’s best-practice information readily available to salespeople.

Sales Methods and Sales Stages

Sales methods are an opportunity attribute that link sales strategy to sales execution. For example, is the customer more interested in price, features, service, or delivery time? After you make these decisions, you can align your sales methods and sales stages to reflect these customer requirements. For example, you can use a different sales methodology for your price-conscious customers than for your customers who are interested in features. A sales method can include all activities associated with the different sales stages during the sales process, from qualifying, to negotiating, to closing.

The application comes with a few sales methods and associated sales stages. Administrators can modify the supplied sales methods and stages, or create new ones.

Sales Coach

Sales Coach is a virtual coach available to salespeople while they view or edit an opportunity. For example, while viewing an opportunity, a salesperson will see Recommended Documents for the sales stage that his opportunity is in. He can download the Recommended Documents that his administrator has posted to help with the sale.

The following table describes the tools available as part of sales methods and sales stages.

<table>
<thead>
<tr>
<th>Tool</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action items (called process steps in the setup UI)</td>
<td>Part of Sales Coach. Guides salespeople through an organization’s sales best-practice processes for a particular sales stage.</td>
</tr>
<tr>
<td>Recommended documents</td>
<td>Part of Sales Coach. Provides coaching strategies and best-practice information in the form of documents, such as customer letter templates, relevant web sites, and training materials.</td>
</tr>
<tr>
<td>Task templates</td>
<td>Provides a list of required or recommended tasks relevant to a particular sales stage. Recommended task templates are optional. Autogenerated task templates are automatically applied to your list of tasks for a particular sales stage, when the opportunity moves to that stage. Note that task templates are not supported in the simplified UI.</td>
</tr>
<tr>
<td>Assessment templates</td>
<td>Helps salespeople analyze and score an opportunity attributes. After selecting an assessment type, salespeople enter a series of responses to achieve a weighted score. This score then helps determine the success rate of the opportunity.</td>
</tr>
</tbody>
</table>

Related Topics

- Sales Coach: Explained
About Opportunity Sales Methods and Stages

A company’s sales methodology is its formalized approach toward achieving a sale. In opportunities, you can employ your company’s sales methodology using a sales method that is automatically associated with the opportunity when it is created. The sales method contains several sales stages that salespeople progress as the opportunity matures.

Several sales methods and stages are predefined. You can use the predefined ones, modify them to suit your business needs, or create new ones.

You can specify the default sales method using the profile option, Sales Method Default. Setting the profile option is discussed in the topic, Setting Default Sales Method Profile Option.

For information on creating new sales methods or editing existing ones, see the topic, Configuring Sales Methods.

Note: Sales Coach, which is a teaching tool and method to push best practice information to salespeople in the opportunities UI, also is set up in the sales methods pages, using the sales stages. Assessments also can be associated to sales stages.

Sales Stages: Explained

Sales stages track the progress of an opportunity during the sales cycle. Salespeople change the sales stage when they determine it’s time to move the opportunity to the next stage.

Sales Stage Attributes

Administrators typically set up the following attributes while setting up sales stages:

- Phase: A step in the sales cycle of an opportunity.
  
  For example, the first step might be Discovery, where the salesperson researches the customer’s needs.
- Order: The sequence of the stage within a sales method.
  
  For example, you might start with Discovery and move to Conclusion.
- Duration: The number of days an opportunity will remain in this stage.
- Stalled Deal Limit: The number of days an opportunity can remain in this stage before it is considered stalled.

Administrators also can associate elements of Sales Coach, such as recommended documents, action items, or assessments, with a sales stage.

Related Topics

- Sales Coach: Explained

Sales Methods and Sales Stages: How They Fit Together

A typical sales method has several sales stages. Each stage within a sales method delineates the progress of an opportunity.
Sales Methods
The sales method used on an opportunity represents your company's formalized approach toward the sale. The application comes with a few predefined sales methods. By default, the sales method used on a newly created opportunity is the supplied Standard Sales Process sales method.

Sales Stages
Several stages usually exist within a single sales method. You use different stages to represent different phases of an opportunity, from prospecting to forecasting to closing the opportunity.

Configuring Sales Methods

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.

Procedure: Sales Methods
You can create and edit sales methods and their stages by following the procedures in this topic.

Note: This topic does not cover the following aspects of sales methods and stages setup:

- Recommended documents
- Action items (called process steps in the setup UI)
- Assessment Templates
- Activity Templates
- Required fields

For information about setting up these aspects of sales methods and stages, see the related topics.

Creating or Editing Sales Methods
Use the following procedure to create or modify existing sales methods.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Sales Methods and Sales Stages

2. If you want to create a sales method: In the Manage Sales Methods page, click the Create icon.

3. If you want to edit a sales method: In the Manage Sales Methods page, drill down on the sales method, or select the row showing the sales method and click the Edit icon.

4. In the Create Sales Method or Edit Sales Method page, fill in the required information. The following are the more complex attributes of sales methods:
   - Set: A set represents a group of business units. The Set field allows the sales method to be shared across multiple business units. Select the Common Set, unless you are aware that a different set should be selected.
Close Window: Set in days, the Close Window value is added to the current date to set the initial opportunity close date. If not set, the application retrieves the default close window from the Opportunity Close Date Default profile option.

Disable: The Disable check box lets you disable the sales method. Only disable sales methods during implementation and not after the methods are in use in current opportunities.

5. Add new or modify existing sales stages as described in the following section, Creating or Editing Sales Stages.
6. Save your changes.

Creating or Editing Sales Stages

Use the following procedure to create or modify existing sales stages.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Sales Methods and Sales Stages

2. From the Manage Sales Methods page, select the sales method whose sales stages you want to modify.

   The Edit Sales Method page appears.

3. To add another sales stage to the sales method: In the Edit Sales Method page, click the Create icon and fill out the required information in the Create Sales Stage page.

4. To edit a sales stage: In the Edit Sales Method page, drill down on the sales stage, or select the row and click the Edit icon. Fill out the required information in the Edit Sales Stage page.

5. Set or enter attributes of sales stages. The following are the more complex fields:

   - Disable: This check box lets you disable the sales stage. Only disable sales stages during implementation and not after the stages are in use in current opportunities.
   - Win Probability: This field represents the likelihood (in percent form) of winning the opportunity. This Win Probability field sets the default win probability at opportunity level for the sales stage. If you don’t want your sales stages to control opportunity win probability, make sure they are not defined by blanking out any value in this field.
   - Duration: Enter the average number of days you expect opportunities to stay in this stage. This field is used in the Stalled Deals infolet and underlying report. When opportunities are in a sales stage longer than the value entered here, they are considered stalled at that stage, and are reported in the stalled deals infolet on the dashboard.

6. Save your changes.

Procedure: Sales Coach

Sales Coach is a mechanism to present best practice sales methodology to salespeople in order to improve their sales effectiveness. A teaching tool, Sales Coach can help less experienced salespeople with aspects of an opportunity when and where they need help. Administrators set up Sales Coach by associating action items and recommended documents with a sales stage. Salespeople can then view these items as they work their opportunities. Since the teaching components or job aids are associated with a specific sales stage, each sales stage potentially can have multiple action items and recommended documents associated with it.

The following are the elements that you can define for each sales stage:

- Sales Coach items:
  - Action items (process steps): These are recommended actions the salesperson should take while working an opportunity in a specific sales stage. Action Items appear in the Sales Coach region of the edit opportunity page.
o Recommended documents: These are documents, files, or URLs recommended for viewing or sharing during a specific sales stage. Recommended Documents appear in the Sales Coach region of the edit opportunity page.

- Other items:
  o Task templates: You can define task templates to set tasks for salespeople to perform. For more information, see the topic, Associating Task Templates with Opportunities: Explained, and the video tutorial, Adding Task and Assessment Templates to Sales Stages.
  o Assessment templates: Assessments let salespeople evaluate the health of an opportunity. Opportunity assessments appear under a separate tab labeled Assessments in the edit opportunity page. For more information, see the topic, Associating Assessment Templates with Opportunities: Explained, and the video tutorial, Adding Task and Assessment Templates to Sales Stages.
  o Required fields: You can mark specific fields as required for a specific sales stage. When a salesperson moves an opportunity to that sales stage, the fields you mark as required become marked with an asterisk and are required to be entered before moving to the next sales stage.

Adding Action Items (Process Steps)

Use the following procedure to add action items to a sales stage. Note that in the setup pages, action items are set up in the Process Steps region.

1. In the Setup and Maintenance work area, go to the following:
   o Offering: Sales
   o Functional Area: Opportunities
   o Task: Manage Sales Methods and Sales Stages

2. From the Manage Sales Methods page, click the sales method whose sales stages you want to modify. The Edit Sales Method page appears.

3. In the Edit Sales Method page, click the sales stage you want to configure. In the upper portion of the page, it's assumed you would have already filled out the core information for the sales stage. For more information about these fields, see the topic, Configuring Sales Methods and Stages.

4. In the Process Steps region, click the create icon to create a process step. Enter your process step information. For example, a first process step or action item might be "Gather High Level Information from Customer". Process steps show up as Action Items in the Sales Coach region in the edit opportunity pages. The action items only show up when the opportunity is in the sales stage that you associated the process steps with.

5. Save your changes.

Adding Recommended Documents

To add recommended documents, edit a sales stage using the steps outlined in the preceding procedure, Adding Action Items (Process Steps). In the Recommended Documents region, attach documents, files, or URLs that you want your salespeople to have access to in the edit opportunity pages. For example, you may want to give your salespeople access to marketing materials, collateral, or websites. Recommended documents are available in the edit opportunity page when the salesperson is editing the opportunity in the sales stage that's associated with these documents.

Related Topics

- Using Sales Coach
- Task Templates: Explained
- Assessment Templates and Task Templates: How They Fit Together
Task and Assessment Templates

**Video**

Watch: This tutorial shows you how you can associate task and assessment with opportunity sales stages. The content of this video is also covered in text topics.

**Procedure: Assessment Templates**

Assessments let salespeople evaluate the health of an opportunity while working it. Assessments can be used, for example, to help determine whether an opportunity is viable enough for the salesperson to offer an incentive, such as a discount, to the customer. Assessments include questions with scored responses. Responding to the questions provides the salesperson with immediate scoring and recommendations or follow-up business processes. You create assessment templates in the setup pages and then add the assessment template to an opportunity sales stage. The assessment generated from the template are accessible to salespeople in the Assessments tab in opportunities for the sales stage you associated them with.

Following are the high-level steps to add assessments to sales stages:

1. Define your assessment templates using the Manage Opportunity Assessment Templates task available from the Setup and Maintenance work area.
   
   For more information, see the Setting Up Assessments chapter in the Implementing Sales guide. The topic, Creating Assessment Templates: Procedure, has the steps.

2. Edit a sales stage and, in the Assessment Templates area, associate the assessments with a sales stage. Mark the assessment mandatory to make it required that the salesperson complete the assessment before he can move the opportunity to another sales stage.
   
   See the topic, Performing an Opportunity Assessment: Procedure, for more information about the sales user perspective. This topic is available in the Managing Opportunities chapter in the Using Sales guide.

Adding Assessments to Sales Stages

Use the following procedure to add an assessment template to an opportunity sales stage.

> **Note:** You must have already created an assessment template before it will be available to add to a sales stage. See the topic, Creating Assessment Templates: Procedure, for the steps.

1. In the Setup and Maintenance work area, go to the following:
   
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Sales Methods and Sales Stages

2. On the Manage Sales Methods page, click the sales method whose sales stages you want to modify.
   
   The Edit Sales Method page appears.

3. In the Edit Sales Method page, click the sales stage you want to configure. In the upper portion of the page, it’s assumed you would have already filled out the core information for the sales stage. For more information about these fields, see the topic, Configuring Sales Methods and Stages.
4. In the Assessment Templates region, click the create icon.
5. Search for and select the assessment template you created earlier.
6. In the **Type** column, pick:

   - **Recommended** if you want the salesperson to have access to the assessment in the Assessments tab for this sales stage, but not be required to fill it out before moving the opportunity to the next sales stage.
   - **Mandatory** if you want the salesperson to have access to the assessment in the Assessments tab for this sales stage, and be required to fill it out before moving the opportunity to the next sales stage.

7. Save your changes.

**Related Topics**

- Setting Up Opportunity Assessments: Points to Consider
- Creating Assessment Templates: Procedure
- Accessing Tasks to Update Existing Setup Data: Procedure

**Procedure: Task Templates**

A task template is a group of tasks associated with a business object, including opportunities. You create a task template in the setup pages and then add the task template to an opportunity sales stage. The tasks generated from the template are accessible to salespeople in the Activities tab in opportunities, for the sales stage you associated them with.

Following are the high-level steps to add tasks to the Activities tab in opportunities for a particular sales stage:

1. Define your task templates using the Manage Sales Task Templates task available from the Setup and Maintenance work area.

   For more information, see the Setting Up Task Templates chapter in the Implementing Sales guide. The topic, Creating a Task Template: Procedure, has the steps.

2. Edit a sales stage and, in the Activity Templates area, associate the task template with a sales stage, as described in the following procedure.

**Adding Task Templates to Sales Stages**

Use the following procedure to add a task template to an opportunity sales stage.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Sales Methods and Sales Stages

2. On the Manage Sales Methods page, click the sales method whose sales stages you want to modify.

   The Edit Sales Method page appears.

3. In the Edit Sales Method page, click the sales stage you want to configure. In the upper portion of the page, it’s assumed you would have already filled out the core information for the sales stage. For more information about these fields, see the topic, Configuring Sales Methods and Stages.

4. In the Activity Templates region, click the create icon.

5. Search for and select the task template you created earlier.

6. In the **Type** column, select **Automatically generated** as the type.

   If you do not select Automatically generated, the associated tasks will not appear in the UI for users.
7. Save your changes.

Related Topics

- Task Templates: Explained
- Defining Tasks: Points to Consider
- Creating a Task Template: Procedure
- Accessing Tasks to Update Existing Setup Data: Procedure

Setting Default Sales Method Profile Option

You can specify the sales method the application automatically applies to all newly created opportunities by setting the profile option Sales Method Default.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Opportunity Profile Options

2. In the search region of the Manage Opportunity Profile Options page, select Opportunity Management as the application, or just enter the profile option name Sales Method Default directly in the Profile Display Name field.
3. In the search results list, click on the profile option name.
4. Set the profile option to the sales method you want to be the default for newly created opportunities.

Note: Opportunity and revenue reports and analytics are designed to work with the Standard Sales Process method supplied by Oracle. If you use other sales methods as the default sales method, then you may need to modify your reports.

Related Topics

- Accessing Tasks to Update Existing Setup Data: Procedure

Sales Statuses

Setting Up Sales Statuses

Opportunities and product lines on opportunities have statuses, such as Open, Won, or Lost. These statuses are part of larger status categories.

The application uses status categories when calculating business intelligence metrics for win/loss analysis. Status categories are not visible in the UI as statuses are.

To change statuses, you can create statuses, associating them with the existing status categories. You cannot add new status categories.
Predefined Sales Statuses and Categories

The application comes with four predefined sales statuses and status categories, as shown in the following table. Salespeople can select these statuses for an opportunity or for a product line while editing an opportunity. The application can set statuses automatically when synchronizing the opportunity header and its product lines.

<table>
<thead>
<tr>
<th>Status Code, Status, and Category</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>Time between when a potential sales is realized and the customer decision on the sale is obtained</td>
</tr>
<tr>
<td>Won</td>
<td>Opportunity is closed with a buying decision from the customer and won over competitors, if any</td>
</tr>
<tr>
<td>Lost</td>
<td>Opportunity is closed without proceeding to a sale and lost to competitors, if any</td>
</tr>
<tr>
<td>No Sale</td>
<td>Opportunity is closed and not pursued</td>
</tr>
</tbody>
</table>

Creating and Modifying Sales Statuses

You can create sales statuses or update existing ones, as long as you stay within the four predefined categories. You also can mark statuses as inactive or active. Inactive statuses do not display in the UI.

The following rules apply when creating sales statuses:

- Statuses must belong to one of the predefined status categories.
- Status codes must be unique and cannot be blank.
- The Status value must be unique and cannot be blank.
- At least one active status in the Open status category must exist.

Oracle recommends that you retain the predefined status codes. As a best practice, if you want to configure statuses, create additional codes. Do not obsolete or replace existing status codes.

Use the following steps to modify sales statuses:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Company Profile
   - Task: Manage Sales Status
2. In the Manage Sales Statuses page click the Add icon to add a new status and:
   - Enter a new **Status Code**.
   - Enter a new **Status**. This is the value that shows in the opportunity pages.
   - Select the **Active** check box.
   - Select from one of the predefined values for **Status Category**.
3. To modify an existing status, click in the row of the status so that it becomes editable and modify the values as you want.
4. Save your changes.
The following figure shows the Manage Sales Statuses page with a new status added named "Abandoned".

```
<table>
<thead>
<tr>
<th>Status Code</th>
<th>Status</th>
<th>Active</th>
<th>Status Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABANDONED</td>
<td>Abandoned</td>
<td>✓</td>
<td>Lost</td>
<td>Custom status for abandoned</td>
</tr>
<tr>
<td>LOST</td>
<td>Lost</td>
<td>✓</td>
<td>Lost</td>
<td>Seeded Lost status for opportunity</td>
</tr>
<tr>
<td>NO_SALE</td>
<td>No Sale</td>
<td>✓</td>
<td>No sale</td>
<td>Seeded No Sale status for opportunity</td>
</tr>
<tr>
<td>OPEN</td>
<td>Open</td>
<td>✓</td>
<td>Open</td>
<td>Seeded Open status for opportunity</td>
</tr>
<tr>
<td>WON</td>
<td>Won</td>
<td>✓</td>
<td>Won</td>
<td>Seeded Won status for opportunity</td>
</tr>
</tbody>
</table>
```

**Related Topics**

- Synchronization of Opportunity and Product Line Attributes: Explained
- Accessing Tasks to Update Existing Setup Data: Procedure

**What QBE values are supported in the Sales Status setup page?**

You can use only Y and N in the query by example (QBE) field located above the Active column in the Manage Sales Statuses page.

**Recommended Actions**

**Adding Recommended Actions to Opportunities**

You must enable the Enable Adaptive Intelligence profile option to integrate Oracle Adaptive Intelligent Apps for Customer Experience. Once enabled, you can then add the Recommended Action column to the Opportunities page to ensure that adaptive intelligent recommendations are displayed on opportunities.

The following are the high-level steps to add the Recommended Actions section to the Edit Opportunity page:

1. Activate a sandbox.
2. Navigate to the Application Composer, available under the Configuration menu.
3. Expand the **Opportunity** object tree.
4. In the Opportunity tree, click the **Pages** link.
5. Ensure that the **Simplified Pages tab** is active.
6. In the region that corresponds to the page you are modifying, duplicate the standard layout and edit the resulting layout. For example, in the Details Page Layout region, duplicate the standard layout and then edit the resulting layout.
7. Add the Recommended Action column to the Opportunities page to ensure that adaptive intelligent recommendations are displayed on opportunities.
8. Save your changes.
9. Publish the sandbox.

Related Topics
- Recommended Actions for Opportunities: Overview

Setting the Opportunity Win Probability Risk Threshold Profile Option

The Opportunity Win Probability Risk Threshold (MOO_WIN_PROB_AI_THRESHOLD) profile option lets you specify the threshold value used to determine the percentage win probability differential. The adaptive intelligence predicted win probability indicator displays based on the results. The default percentage win probability differential is 30.

Use the following procedure to enable the Opportunity Win Probability Risk Threshold profile option:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values
2. From the search region of the Manage Administrator Profile Values page, enter the profile option code name MOO_WIN_PROB_AI_THRESHOLD in the Profile Option Code field.
3. Click Search.
4. In the list that is returned, click on the profile option code link.
5. Set the profile option value as needed.
6. Click Save and Close.

Related Topics
- Recommended Actions for Opportunities: Overview
- What’s the difference between win probability and predicted win probability
- Accessing Tasks to Update Existing Setup Data: Procedure

Setting the Enable Adaptive Intelligence Profile Option

The Enable Adaptive Intelligence (ZCA_ENABLE_ADAPTIVE_INTELLIGENCE) profile option enables the integration between Oracle Adaptive Intelligent Apps for Customer Experience and your sales application. The profile option is not enabled by default. After you enable the profile option, you can extend the opportunity list and detail pages to display the Recommended Actions section and related steps. In addition, the Recommended Action column is displayed on the Opportunities edit page only after you add it to the Opportunities detail page using Application Composer. For more details, see the Adding Recommended Actions to Opportunities topic.

Use the following procedure to enable the Enable Adaptive Intelligence profile option:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Define Sales Foundation
   - Task: Manage Administrator Profile Values
2. From the search region of the Manage Administrator Profile Values page, enter the profile option code name ZCA_ENABLE_ADAPTIVE_INTELLIGENCE in the Profile Option Code field.

3. Click Search.

4. In the list that is returned, click on the profile option code link.

5. Set the profile option value to Yes.

6. Click Save and Close.

For more information about adaptive intelligence in Oracle applications, see the Oracle Adaptive Intelligent Apps for Customer Experience - Get Started documentation on the Oracle Help Center.

**Related Topics**

- Recommended Actions for Opportunities: Overview
- Accessing Tasks to Update Existing Setup Data: Procedure

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### Closing Opportunities

#### About Setting Up Opportunity Closing

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 portion of 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).
• 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).

By setting profile options, you can:

• Make the entry of the win or loss reason optional.
• Make the entry of the competitor optional.
• Set a different number of days for the default opportunity close date.

If you keep the default application behavior, then the setup user or another user with the Sales Administrator job role must create the list of competitors as described in the Setting Up Competitors chapter.

If you make the win or loss and competitor entry optional, the fields remain the Edit Opportunity page. You can use Application Composer to remove them.
Setting the Close Opportunity Profile Options

Using profile options discussed in this topic, you can configure close opportunity behavior.

Close Opportunity Profile Options

The following table shows the profile options that control opportunity close behavior.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Default Value</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close Opportunity Win/Loss Reason Required</td>
<td>Yes</td>
<td>Determines whether, when closing an opportunity, the user is required to enter a win or loss reason. Applies both at the opportunity and revenue item levels.</td>
</tr>
<tr>
<td>Close Opportunity Competitor Required</td>
<td>Yes</td>
<td>Determines whether, when closing an opportunity, the user is required to enter a competitor. Applies both at the opportunity and revenue item levels.</td>
</tr>
<tr>
<td>Opportunity Close Date Default</td>
<td>20</td>
<td>Determines the number of days after an opportunity is created for the initial close date. If you want the application to show a blank close date when an opportunity is initially created, blank out any value in this profile option and ensure the Close Window field in the Edit Sales Method page is blank.</td>
</tr>
<tr>
<td>Opportunity Close Date Retain on Closure</td>
<td>No</td>
<td>Tells the application to retain the old close date even after the status of the opportunity or product line is set to a closed status. If you do not set this profile option to yes, then the close date on the opportunity header or product line is updated with the current date when the opportunity or product line is closed.</td>
</tr>
</tbody>
</table>

Setting the Profile Options

Use the following procedure to find and set the close opportunity profile options.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Opportunity Profile Options

2. In the search region of the Manage Opportunity Profile Options page, enter the profile option name in the **Profile Display Name** field.
3. Click **Search**.
4. In the list that is returned, click on the profile option name link.
5. Set the profile option value as needed.

**Related Topics**
- Accessing Tasks to Update Existing Setup Data: Procedure

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**Summary of Opportunity Business Logic: Explained**

This topic provides a summary of opportunity and product-line business rules relevant to opportunity close processes and their applicability in the edit opportunity, close opportunity, mass update opportunities, and mass update revenue lines flows.

The following table describes the synchronization update behavior during the close opportunity flow.

<table>
<thead>
<tr>
<th>Object or Field Being Updated</th>
<th>Behavior</th>
<th>Applicable to Edit Opportunity Flow</th>
<th>Applicable to Close Opportunity Flow</th>
<th>Applicable to Mass Update Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Win probability, close date, status</td>
<td>Copy opportunity attribute value to revenue line attribute values.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Win/loss reason</td>
<td>Copy opportunity attribute value to revenue line attribute values.</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

The following table describes the field or attribute change behavior during a change to opportunity status in the context of the close opportunity flow.

<table>
<thead>
<tr>
<th>Opportunity Status Change</th>
<th>Behavior</th>
<th>Applicable to Edit Opportunity Flow</th>
<th>Applicable to Close Opportunity Flow</th>
<th>Applicable to Mass Update Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>To won</td>
<td>Set sales stage to last stage of sales method. Set win probability to 100 percent.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>To lost or no sale</td>
<td>Set close date to current date</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
| From open to closed       | • Enable win/loss reason  
  • Set actual close date to system time stamp                                                                | Yes                                 | Yes                                 | Yes                                    |
| From open to closed       | Copy primary competitor to revenue line where competitor is undefined                                        | No                                  | Yes                                 | Yes                                    |
| From closed to open       | • Set actual close date to undefined Disable win/loss reason. Set win/                                       | Yes                                 | Yes                                 | Yes                                    |
The following table describes the field or attribute change behavior during a change to opportunity revenue line status in the context of the close opportunity flow.

<table>
<thead>
<tr>
<th>Revenue Line Status Change</th>
<th>Behavior</th>
<th>Applicable to Edit Opportunity Flow</th>
<th>Applicable to Close Opportunity Flow</th>
<th>Applicable to Mass Update Opportunities</th>
<th>Mass Update Revenue Lines</th>
</tr>
</thead>
<tbody>
<tr>
<td>To won</td>
<td>Set win probability to 100 percent.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>To lost or no sale</td>
<td>Set close date to current date.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>From open to closed</td>
<td>• Enable win/loss reason.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>• Set actual close date to system time stamp.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>From closed to open</td>
<td>• Disable win/loss reason.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>• Set win/loss reason to undefined.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Set actual close date to undefined</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The following table describes the validations done for competitor, win/loss reason, and status, during the close opportunity flow.

<table>
<thead>
<tr>
<th>Object Being Validated</th>
<th>Behavior</th>
<th>Applicable to Edit Opportunity Flow</th>
<th>Applicable to Close Opportunity Flow</th>
<th>Applicable to Mass Update Opportunities</th>
<th>Mass Update Revenue Lines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competitor</td>
<td>If the profile option, Close Opportunity Competitor Requirement, is enabled, require competitor on opportunity and revenue line.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Competitor</td>
<td>Validation error dialog option to copy primary competitor to revenue line.</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>
Object Being Validated | Behavior | Applicable to Edit Opportunity Flow | Applicable to Close Opportunity Flow | Applicable to Mass Update Opportunities | Mass Update Revenue Lines
--- | --- | --- | --- | --- | ---
Win/loss reason | If the profile option, Close Opportunity Win/Loss Reason Requirement, is enabled, require win/loss reason on opportunity and revenue line. | Yes | Yes | Yes | Yes

Status | Revenue line status must be valid for opportunity status. | Yes | Yes | Yes | Yes

Related Topics
- Synchronization of Opportunity and Product Line Attributes: Explained

**Data Security**

**How Sales Users Gain Access to Opportunities: Explained**

This topic explains how the security reference implementation provided by Oracle determines who can access what opportunity information in your sales organization.

Whether or not you can access a particular opportunity depends on your membership in the resource and territory hierarchies. You can access an opportunity if:

- You create the opportunity.
- You are on the opportunity sales team.
- The opportunity owner or sales team member is your direct or indirect report in the resource hierarchy.
- You are the owner or are a member of the territory assigned to the opportunity.
- You are the owner or member of an ancestor territory of the territory assigned to the opportunity.
- You are assigned to a territory associated with the opportunity.
- You are assigned to a territory that is an ancestor of the territory associated with the opportunity.

Salespeople can see all opportunities related to their accounts. However, access differs between territory members and opportunity members:

- An opportunity owner gets full access to the opportunity, which includes the ability to edit as well as add and remove team members.
- Owners and members of territories or of ancestor territories assigned to the account of the opportunity get read-only access to the opportunity and are not added to the opportunity sales team.
- Owners and members of territories assigned to the opportunity product lines are added as a distinct list of territories to the opportunity sales team. Owners and members of these territories get full access to the opportunity. Depending on a profile option, either only the owner or all the members of the territory are added as resources to the
opportunity sales team. Regardless of the access level for these members as a resource on the opportunity team, they always have full access.

Owners and members of ancestor territories of the territory assigned to the opportunity do not get added to the opportunity sales team but they always get full access.

The following figure illustrates some of the different ways you can gain access to an opportunity:

- Named agents in the diagram (A, B, and C) can access the opportunity.
- Unnamed agents (highlighted in yellow) cannot access the opportunity.
- Sales managers can access the opportunity because a salesperson in their management chain has access.
This figure shows who in a sales hierarchy can access an opportunity.

- Agent A can access the opportunity because she created it. When you create an opportunity, you are the initial owner.
- Agent B can access the opportunity because he is on the sales team.
- Agent C can access the opportunity because he is the owner of the NW territory.
- Sales managers who are higher up in the management chain can also see the opportunity because access is provided through the resource hierarchy. Agent C’s manager can access the opportunity information, but agent C’s colleagues cannot.
• Sales administrators can access the opportunity.

**Note:** Access using accounts is not shown in this figure.

### Special Access

Some access is not affected by the management hierarchy and membership in sales teams or territories. This special access includes:

- **Administrators:** Users assigned the Sales Administrator job role get full access to opportunities and other objects. This access is based on their privileges, regardless of where the administrators are in the management hierarchy. Administrators do not have to be on the sales team or members of territories.

- **Deal Protection:** Salespeople assigned to an opportunity retain the sales credit on an opportunity even if they are moved to another opportunity.

### Default Sales Channel

#### Default Sales Channel in Opportunities: Explained

The sales channel of an opportunity indicates whether the opportunity is being handled directly by an internal salesperson, or indirectly by an outside partner, such as a distributor or a re-seller. You can define your territories to include sales channel, which will allow you to assign defined resources for each channel and to analyze your revenue by sales channel.

#### Sales Channel Support

You can set the sales channel at the opportunity header and revenue item levels. The application automatically applies the header value to revenue items when the status category matches.

Use the Manage Default Attributes for Partner Opportunities task to set the default sales channel. This setup allows the Lead Registration Type of a partner lead to determine the default sales channel on an opportunity once the lead registration is approved and converted into an opportunity. If partner functionality is not implemented, the application automatically sets the sales channel to Direct for all opportunities. Refer to the topic, Partner Lead Registration Type in Opportunities: Explained, for additional information.

#### Default Sales Channel During Opportunity Creation

If a salesperson creates an opportunity, because there is no partner and no lead registration type associated with the opportunity, the header-level sales channel is set to Direct. If the salesperson adds revenue items while creating the opportunity, the sales channel of the revenue lines is set to the same sales channel as the header.

If an opportunity is created from a lead conversion, it will not have a lead registration type, and the sales channel also will be set to Direct.

If an opportunity is created from an approved lead registration, the application uses the lead registration type to determine the appropriate header-level sales channel value. For example, an opportunity that originated from a Resale lead registration carries a default sales channel of Indirect (using the default configuration).

When a revenue item is added to an opportunity, the default value of the sales channel always matches the header-level value.
Note that if a lead registration is linked to an opportunity manually from the leads UI, the sales channel defaulting logic based on lead registration type does not apply.

# Opportunity Search

## Setting Opportunity Search Profile Options: Explained

Using profile options discussed in this topic, you can configure opportunity search behavior.

### Opportunity Search Profile Options

The following table shows the profile options that control opportunity search behavior.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Default Value</th>
<th>Effect</th>
</tr>
</thead>
</table>
| Require Additional Criteria for Opportunity Search Enabled | No | Determines whether additional search criteria, other than close date, is required when you want your search to:  
  - Extend across all opportunities  
  - Rely on hierarchy rollups |
| Opportunity Number Search Enabled for Simplified UI | No | Enable opportunity search by Opportunity Number in the simplified UI. |
| Opportunity Search Close Period Default | Current Quarter | Specify the default value displayed in the Close Period list of values in opportunity search. |
| Search Opportunity Filter Default | My Opportunities | Specify the default value displayed in the table filter in revenue search. |
| Opportunity Search Context-Based Data Security Enabled | No | Enable for improved performance of opportunity search. |
| Opportunity Search High Performance Data Security Wrapper Query Enabled | Yes | Enable SQL wrapper query on top of data security SQL predicates for improved performance of opportunity search. If disabled, use underlying data security SQL predicates. |
| Opportunity Search Panel Collapsed | Yes | Enable a collapsed view of opportunity search panel by default. Set to No to have default view as expanded. |

### Sorting Opportunity Searches by Last Update Date

You can sort the records returned from your opportunity search by setting the Opportunity List Sort profile option. By default, records on the Opportunity List are sorted by Win Probability and Opportunity Name. However, setting the Opportunity
List Sort profile option value to Y enables opportunities to be sorted by last updated date in descending order so that sales representatives can quickly review and action recently updated opportunities.

Setting the Profile Options
Use the following procedure to find and set the opportunity search profile options.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Opportunity Profile Options
2. In the search region of the Manage Opportunity Profile Options page, enter the profile option name in the **Profile Display Name** field.
3. Click **Search**.
4. In the list that is returned, click on the profile option name link.
5. Set the profile option value as needed.
6. Click **Save**.

Related Topics
- Accessing Tasks to Update Existing Setup Data: Procedure

Making the Opportunity List Sort By Last Updated Date
You can sort the records returned from your opportunity search by setting the Opportunity List Sort profile option.

Sorting Opportunity Searches by Last Update Date
By default, records on the Opportunities overview page are sorted by win probability and opportunity name. However, if you set the Opportunity List Sort (MOO_LIST_DEFAULT_SORT) profile option to Y, then the opportunities are sorted by last updated date in descending order. This enables sales representatives to quickly review and act upon recently updated opportunities.

Setting the Profile Option
Use the following procedure to set the Opportunity List Sort profile option:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Opportunity Profile Options
2. In the search region of the Manage Opportunity Profile Options page, enter Opportunity List Sort in the **Profile Display Name** field.
3. Click **Search**.
4. In the Profile Values section, select Y from the **Profile Value** drop-down list.
5. Click **Save**.

Related Topics
- Accessing Tasks to Update Existing Setup Data: Procedure
Configuring Opportunity Close Period Search: Explained

When searching for opportunities, users have several opportunity fields on which to search. One of the fields is Close Period, which is a range based on opportunity close date. If the supplied opportunity Close Period search values do not meet your business needs, you can add or remove the values that the user can see by modifying the opportunity lookup type, Close Period Values for Search. For example, you can configure the Close Period search so that users can pick all opportunities in the past 45 days, in the current year, in the next three quarters, or in the next three years. You can enable values that are not enabled by default, and you can add your own user-defined values.

Note that end users can search for an opportunity without any close date filter.

Use the following procedure to modify the lookup type:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Standard Lookups

2. In the Manage Standard Lookups page, search for the lookup type, Close Period Values for Search (MOO_OPTY_SRCH_CLS_PERIOD) and update the lookup codes as needed:
   - Use the Enabled to enable or disable a specific lookup code.
   - Update the meaning (display name), start date, end date, check box or display sequence of any of the predefined values.
   - Add or remove lookup codes, as long as they follow the correct lookup code formatting. See the following section, Behavior and Best Practices, for more information on properly formatted lookup codes.

Behavior and Best Practices

Typically, in your implementation, you will already have created and have in use the accounting calendar, also called the fiscal calendar. The behavior of and best practices for the close period lookup type values are different depending on whether they reference standard Gregorian or accounting calendar lookup values.

The following table describes the differences for the lookup type MOO_OPTY_SRCH_CLS_PERIOD.

<table>
<thead>
<tr>
<th>Standard Gregorian Calendar Values</th>
<th>Fiscal/Accounting Calendar Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>The enabled Gregorian periods are displayed.</td>
<td>The enabled fiscal periods are displayed, in addition to the enabled Gregorian periods.</td>
</tr>
</tbody>
</table>

Supported periods are:
- Day
- Week
- Quarter
- Month

Supported periods are:
- Quarter
- Year
Standard Gregorian Calendar Values | Fiscal/Accounting Calendar Values
--- | ---
• Year | • Fiscal period lookup codes must have the suffix _FSCL.
• CURR_QTR: Current Quarter | • Predefined fiscal periods include the term "Fiscal" in the display name, for example, CURR_QTR_FSCL: Current Fiscal Quarter.
• NEXT_4_QTRS: Next 4 Quarters |  
• PREV_180_DAYS: Previous 180 Days

Lookup codes do not require a suffix as per the following examples:

- Fiscal period lookup codes must have the suffix _FSCL.
- Predefined fiscal periods include the term "Fiscal" in the display name, for example, CURR_QTR_FSCL: Current Fiscal Quarter.

You must enter the correct code as invalid values are not displayed in the UI.

The following behavior and best practices are common to both types of calendars:

- Close period lookup codes not in the correct format are not shown.
- When the accounting calendar and the close period setup do not match (for instance, the accounting calendar is set up for a quarter, but the fiscal period is set to Next Month), then this close period value is not shown.
- When the default close period value or a value previously used in a saved search is disabled, then the close date range on that search is set to blank. End users can save the same search with a new value for future use, or they can restore the value, in which case the search would work as before.
- You can define a close period called "All" that includes a time span wide enough to view all open opportunities in one list, rather than viewing multiple lists for different periods.

Related Topics
- Creating the Accounting Calendar
- Accessing Tasks to Update Existing Setup Data: Procedure

Assets Integration

Enabling the Opportunities Subtab in Assets

You can expose the Opportunities subtab in the Edit Asset page to give salespeople the ability to associate opportunities with assets. You must expose asset fields in the opportunity pages to display the asset information for the opportunity. By default, the Opportunities subtab does not appear in the Edit Assets page.

Use the following procedure to expose the Opportunities subtab in the Edit Asset page.

1. Sign in as a sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to Application Composer, in the Configuration category.
4. Select Sales.
5. In the navigation tree, expand Standard Objects, expand Asset, and click Pages.
6. Ensure that the Simplified Pages tab is selected.
7. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the Duplicate icon.
8. Type a new layout name and click Save and Edit.
The Details Layout page appears.

9. In the Subtabs Region, click the **Hide, Show, or Reorder Subtabs** icon. The Configure Subtabs dialog box appears.
10. Move Opportunities from the Available Subtabs window to the Selected Subtabs window.
11. Click **OK**.
12. From the Details Layout page, click **Done**.
13. Make sure that the layout status for your layout is set to Active.
14. Test the changes as follows:
   - Navigate to **Sales > Assets** as a user with access to the assets pages, for example, as a salesperson.
   - Edit an asset and ensure you can see the Opportunities subtab in the Edit Asset page.
15. Publish the sandbox.

For more information, see the related topics and the Extending Sales guide.

**Related Topics**
- Setting Up Sales Assets: Overview
- Sales Assets: Overview
- Enabling the Leads Subtab in Assets

## Quotes Integration

### Integrating Quotes: Explained

You can integrate with Oracle Configure, Price, and Quote (CPQ) Cloud to enhance sales processes in an automated opportunity-to-quote-to-order flow. Quotes let your sales team members create professional proposal documents for customers that include current product and pricing information.

Salespeople can create quotes from an opportunity as part of a deal cycle or directly for an account. Basic quote information such as quote number, quote amount, status, and proposal documents are captured in the quotes and orders pages. Salespeople can view the quotes and orders in the context of an account or an opportunity. Salespeople use quotes to select valid product configurations based on customer needs, to specify pricing and discounts, and to create professional proposal documents. The following is a summary of the features provided:

- Create valid product configurations
- Perform automated pricing calculations
- Apply discounts
- Streamline approval processes
- Create professional proposal documents to share and collaborate with customers to close a deal

**Note:** You must integrate with Oracle CPQ Cloud to achieve the quoting functionality. Refer to the Oracle CPQ Cloud Help Center for more information.

For more information about how to set up the integration, see CPQ Cloud to Oracle Sales Cloud Integration Overview (2015009.1) on My Oracle Support at https://support.oracle.com.
Access to Quotes

Salespeople access quotes in the sales pages, where they can review the latest information in the quote and make necessary updates. Salespeople can search for quotes from the quotes work area or the global search. The quotes list page shows the salesperson’s list of relevant quotes. The quotes pages are available for the following roles:

- Sales Representative
- Sales Manager
- Sales VP
- Sales Administrators
- Channel Operations Manager
- Channel Account Manager
- Channel Sales Manager
- Partner Administrator
- Partner Sales Representative
- Partner Sales Manager

Administrators can enable access to quotes by user role.

- Sales and partner user roles: Enable the Quotes and Orders icon for each user role, using the Structure page.
- Custom roles: Add the required function privileges and data security policies.

Upgrading Customers

Upgrading customers have a different set of steps to follow when integrating with the quotes and orders feature. Upgrading customers must perform the following steps to use the quotes and orders list feature:

1. If security for opportunities has been extended, ensure the same extensions are done for quotes and orders security.
2. Log a service request to enable the quotes and orders list functionality.
3. After the feature is enabled by Oracle, enable the Quotes and Orders list from the Structures tool and enable global search for Quotes and Orders.

Related Topics

- Oracle Help Center
- Configuring the Navigator and Springboard
- Creating Groups and Page Entries for Navigation: Procedure

Copy Maps

Setting Up Your Mapping File When Copying Opportunities

You can use two predefined mapping templates for copying an opportunity. The Standard Copy Opportunity Mapping (MOO_COPY_OPTY_MAPPING) is a noneditable template which performs a standard copy of one opportunity to another. The Copy Opportunity Mapping is an editable template that you use as the default mapping file for copying an opportunity.
When you copy opportunities, information such as sales stage, win probability, and status for the opportunity are not copied to the new opportunity. You may want to include additional information about the opportunity but the necessary attributes are not contained in the predefined **Standard Copy Opportunity Map**. To include the information you want, you can add attributes to a copy of the predefined mapping file, called **Copy Opportunity Map**.

> **Note:** Territory information, such as resource team records are not copied as the resources are allocated on an on demand basis. Resources that are added manually, as well as those added through opportunity assignment, are copied to the newly created opportunity.

To include additional attributes or child objects to the editable copy of the predefined Copy Opportunity Map, do the following:

1. Sign in as a user with Application Composer access and verify that you have an active sandbox.
2. Access Application Composer by selecting **Application Composer** from the **Navigator** menu.
3. Select **Sales** to filter the object search, and select **Copy Maps** within **Advanced Setup**.
4. Expand **Copy Opportunity** and select **Copy Opportunity Map**.

The **Edit Copy Map** window appears, and you use it to add additional attributes to your copy map.

5. Select each line in the **Entity Mappings** section and add records to the **Attribute Mappings** section. For example, complete the following for each of the attributes you want to add:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To</td>
<td>Select the attribute to where the selected entity is copied.</td>
</tr>
<tr>
<td>Referenced View Object</td>
<td>If this attribute is a foreign key, select the view object joined by this foreign key. The application generates new foreign keys that keep the reference intact.</td>
</tr>
<tr>
<td>Primary Key</td>
<td>If this attribute is a primary key, select this check box. Instead of copying the value in the From object, the application generates a unique value for this key field for each record in the To object.</td>
</tr>
<tr>
<td>From</td>
<td>Select the attribute from where the selected entity is copied.</td>
</tr>
<tr>
<td>From Expression</td>
<td>Optionally, you can enter a Groovy expression to change the value in this attribute. For example, you want to change the value of the From object to some new value in the attribute of the To object. You can also enter a constant to fill this attribute with a constant value in every record of the To object.</td>
</tr>
</tbody>
</table>

6. Click **Save and Close**.

### Setting the Copy Opportunity Mapping Profile Option

You can specify the mapping file name to use when copying an opportunity by setting the Copy Opportunity Mapping profile option. The predefined file is used to copy attributes and child objects when creating a copy of an existing opportunity.

The following procedure describes how to access and modify the Copy Opportunity Mapping profile option:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Opportunity Profile Options
2. In the Manage Opportunity Profile Options page, enter Copy Opportunity Mapping in the **Profile Display Name** field.
3. Click **Search**.
4. In the Profile Values section, you can see the predefined mapping called **Copy Opportunity Map**.
5. Click **Save**.

**Note:** If you want to use the Standard Copy Opportunity Map, change the profile value to **Standard Copy Opportunity Map**.

**Related Topics**
- Updating the Copy Map to Copy the Lead Contact Value: Worked Example
- Creating a Copy Map: Procedure
- Accessing Tasks to Update Existing Setup Data: Procedure

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**Opportunity Setup Data Reference**

**Opportunity Profile Options: Explained**

Opportunity profile options are configurable options that affect how opportunities are managed. Values defined at the user level take precedence over values set at the site level. If a value is not defined at the user level, the site level value is used.

The effect of setting each of the opportunity profile options is described in the following sections:

- Opportunity Assignment
- Opportunity Close Options
- Opportunity Sales Method and Revenue
- Opportunity Team, Partner, and Social Network
- Opportunity Searches
- Opportunity Lists and Filters
- Opportunity Copy Mapping

**Opportunity Assignment**

The following table lists the profile options that affect the assignment of opportunities.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Default Value</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Territory-Based Assignment Rule Category</td>
<td>None</td>
<td>Specifies the rule category used for rule filtering during opportunity territory-based assignment.</td>
</tr>
<tr>
<td>Territory Based Resource Assignment Style</td>
<td>All</td>
<td>Determines whether to copy all territory resources to the opportunity team or just the territory owner during territory assignment. Selecting the Exclude All option prevents territory members from being added to an</td>
</tr>
</tbody>
</table>
Opportunity Close Behavior

The following table shows the profile options that control opportunity close behavior.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Default Value</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close Opportunity Win/Loss Reason Required</td>
<td>Yes</td>
<td>Determines whether, when closing an opportunity, the user is required to enter a win or loss reason. Applies both at the opportunity and revenue item levels.</td>
</tr>
<tr>
<td>Close Opportunity Competitor Required</td>
<td>Yes</td>
<td>Determines whether, when closing an opportunity, the user is required to enter a competitor. Applies both at the opportunity and revenue item levels.</td>
</tr>
<tr>
<td>Opportunity Close Date Default</td>
<td>20</td>
<td>Determines the number of days after an opportunity is created for the initial close date.</td>
</tr>
</tbody>
</table>

If you want the application to show a blank close date when an opportunity is initially created, blank out any value in this profile option and ensure the Close Window field in the Edit Sales Method page is blank.
### Opportunity Sales Methods and Revenue

The following table lists the profile options that affect the opportunity sales methods and revenue lines.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Default Value</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity Close Date Retain on Closure</td>
<td>No</td>
<td>Instructs the application to retain the old close date even after the status of the opportunity or product line is set to a closed status. If you do not set this profile option to yes, then the close date on the opportunity header or product line is updated with the current date when the opportunity or product line is closed.</td>
</tr>
<tr>
<td>Close Opportunity Flow Enabled</td>
<td>No</td>
<td>Enables the Close Opportunity interface to record details about the close.</td>
</tr>
<tr>
<td>Close Date Range Maximum Value</td>
<td>366</td>
<td>Specifies the maximum number of days the Close Date Range parameter can be set to. Applies to both revenue and opportunity search.</td>
</tr>
<tr>
<td>Search Revenue Filter Default</td>
<td>My Revenue Items</td>
<td>Specifies the default value displayed in the Show table filter in revenue search.</td>
</tr>
<tr>
<td>Multiple Currencies for Opportunity Revenue Lines Enabled</td>
<td>N</td>
<td>Enables multiple currencies for opportunity revenue lines independently of the opportunity header currency. A value of No synchronizes header currency to the lines.</td>
</tr>
<tr>
<td>Nonrevenue Credit Allocation Style</td>
<td>Proportional</td>
<td>Specifies the default type of nonrevenue credit allocation split.</td>
</tr>
<tr>
<td>Sales Method Default</td>
<td>None</td>
<td>Specifies the default sales method for the business unit. The value specified is used when creating a new opportunity.</td>
</tr>
<tr>
<td>Browse Sales Catalog in Opportunities Enabled</td>
<td>N</td>
<td>Specifies whether to allow sales personnel to browse the sales catalog from the Products region in the opportunities UI.</td>
</tr>
<tr>
<td>Opportunity Sales Credit Enabled</td>
<td>N</td>
<td>Enables the sales credit interface in the opportunity UI to view and record sales credit allocations for opportunity lines.</td>
</tr>
<tr>
<td>Opportunity Synchronization Cascade Enabled</td>
<td>Y</td>
<td>Enables the opportunity cascading logic to keep opportunity summary and revenue lines in synchronization with each other.</td>
</tr>
</tbody>
</table>
Opportunity Team, Partner, and Social Network

The following table lists the profile options that affect the team, partner, and social network options for opportunities.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Default Value</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal Resource Sales Team Access Level Default</td>
<td>Edit</td>
<td>Determines the default access level for an internal resource added to the sales team.</td>
</tr>
<tr>
<td>Internal Resource Sales Team Function Default</td>
<td>Integrator</td>
<td>Determines the default function for an internal resource added to the sales team.</td>
</tr>
<tr>
<td>Opportunity Resource Deal Protection Period</td>
<td>0</td>
<td>Specifies the default number of days that territory resources are protected to stay on a deal, even if ineligible through territory realignment.</td>
</tr>
<tr>
<td>Partner Resource Sales Team Access Level Default</td>
<td>No Access</td>
<td>Determines the default access level for partner resources added to the opportunity sales team.</td>
</tr>
<tr>
<td>Partner Resource Sales Team Function Default</td>
<td>Integrator</td>
<td>Determines the default function for partner resources added to the opportunity sales team.</td>
</tr>
<tr>
<td>Oracle Social Network for Opportunities Enabled</td>
<td>Y</td>
<td>Enables Oracle Social Network feature for opportunities.</td>
</tr>
</tbody>
</table>

Opportunity Searches

The following table lists the profile options that affect opportunity searches.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Default Value</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Require Additional Criteria for Opportunity Search Enabled</td>
<td>No</td>
<td>Determines whether additional search criteria, other than close date, is required when you want your search to:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Extend across all opportunities</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Rely on hierarchy rollups</td>
</tr>
<tr>
<td>Opportunity Number Search Enabled for Simplified UI</td>
<td>No</td>
<td>Enables opportunity search by Opportunity Number.</td>
</tr>
<tr>
<td>Opportunity Search Close Period Default</td>
<td>Current Fiscal Quarter</td>
<td>Specifies the default value displayed in the Close Period list of values in opportunity and revenue search.</td>
</tr>
<tr>
<td>Search Opportunity Filter Default</td>
<td>My Opportunities</td>
<td>Specifies the default value displayed in the table filter in revenue search.</td>
</tr>
<tr>
<td>Profile Option Display Name</td>
<td>Default Value</td>
<td>Effect</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>--------------</td>
<td>--------</td>
</tr>
<tr>
<td>Opportunity Search Context-Based Data Security Enabled</td>
<td>No</td>
<td>Enables improved performance of opportunity search.</td>
</tr>
<tr>
<td>Opportunity Search High Performance Data Security Wrapper Query Enabled</td>
<td>Yes</td>
<td>Enables SQL wrapper query on top of data security SQL predicates for improved performance of opportunity search. If disabled, the application uses underlying data security SQL predicates.</td>
</tr>
<tr>
<td>Opportunity Search Panel Collapsed</td>
<td>Yes</td>
<td>Enables a collapsed view of opportunity search panel by default. Set to No to make the expanded view the default view.</td>
</tr>
</tbody>
</table>

### Opportunity Lists and Filters
The following table lists the profile options that affect opportunity lists and filters.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Default Value</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity List Show Filter Default</td>
<td>My Open Opportunities</td>
<td>Specifies the default value for the Show filter in the opportunity list. Enter My Open Opportunities or My Sales Team Open Opportunities.</td>
</tr>
<tr>
<td>Opportunity List Time Period Default</td>
<td>Quarter</td>
<td>Specifies the default time period in the opportunity list. Enter Quarter or Year to set the default to current quarter or current year, respectively.</td>
</tr>
<tr>
<td>All Open Opportunities List Enabled</td>
<td>Y</td>
<td>Enables the opportunity list to show all open opportunities across all time periods.</td>
</tr>
<tr>
<td>Opportunity List Sort</td>
<td>N</td>
<td>Specifies how you want to sort opportunities. The default is to sort by Win Probability and Name. You can specify to sort by Last Updated Date or you can remove any form of sorting.</td>
</tr>
<tr>
<td>Sales Historical Snapshot Record Limit</td>
<td>10000000</td>
<td>Specifies the maximum number of records retained in the Sales historical snapshot tables.</td>
</tr>
<tr>
<td>Sales Historical Snapshot Configuration</td>
<td>C=120, D=120, W=58,M=14,Q=5</td>
<td>Specifies the capture and retention settings for opportunity historical snapshots. C is the number of days to look backward at closed opportunities, D is for number of days, W is for number of weeks, M is for number of months, and Q is for number of quarters.</td>
</tr>
</tbody>
</table>
Opportunity Copy Mapping

The following table lists the profile option used when copying opportunities.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Default Value</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy Opportunity Mapping</td>
<td>Copy Opportunity Map</td>
<td>Specify the mapping file name to use when copying an opportunity. The file is used to copy attributes and child objects when creating a copy of an existing opportunity.</td>
</tr>
</tbody>
</table>
20 Setting Up Opportunity Revenue

Setting Up Opportunity Revenue: Points to Consider

The sales opportunity revenue model allows several feature configuration options during and after implementation. For example, you can make some fields read-only and modify lookups to meet your unique business needs.

Revenue Amount and Revenue Type

Consider the following options about the Revenue Amount and Revenue Type fields:

- You may want to configure opportunities with Revenue Amount as a read-only field. This setup ensures that the revenue amount reconciles with quantity and estimated price. By default, the Revenue Amount is editable for cases where salespeople know a projected revenue amount but may not know the quantity. You can make the revenue amount read-only through configuration. For more information about configuring applications, see the Extending Sales guide.

- Using Revenue Type, you can categorize revenue lines for grouping, sorting, and summarization purposes. The application comes with several predefined values, such as Pipeline, Upside, Expected, Committed, and Closed. Stored in the lookup MOO_REVENUE_TYPE, the values are user-defined.

⚠️ Caution: You should avoid changing these values after users have begun using the application, as data integrity issues may result. If you do decide to obsolete existing values after the application is deployed, be sure to clean up the revenue records that refer to the obsolete values.

Product Selection

Consider the following options for product selection:

- To enable users to browse the sales catalog, you must set the profile option, Browse Sales Catalog in Opportunities Enabled (MOO_ENABLE_BROWSE_CATALOG), to Yes.

- The product and product group search screens and sales catalog filter by territory. This filtering limits the product selection to those products available in a salesperson’s territories. A check box in the product search pages lets salespeople turn off the filtering. For more information about this setup, see the topic, Configuring Sales Catalog Usage: Explained.

- The product and product group search screens contain the same values as those in the sales catalog, if implemented.

Sales Credit Assignment

Consider the following rules around sales credit assignment:

- To enable the Sales Credit icon in the opportunity products table, you must set the profile option, Opportunity Sales Credit Enabled (MOO_ENABLE_SALES_CREDITS) to Yes.

- The application automatically assigns the salesperson who added the product line to the opportunity one hundred percent of the sales revenue credit, and makes him the default sales credit recipient.

- Users need Full or Edit permissions to override the default sales credit recipient.
• The territory assignment process can update credit recipients, unless they are locked in.

For more information about how salespeople assign sales credits in opportunities, see the Using Sales guide. Also see the related setup topics for sales credits.

Business Units
Each product line is associated with a single business unit. The application uses the opportunity header business unit (which is based on the profile of the user who created the opportunity) to populate the default business unit on product lines. Business unit as a field is not displayed in the UI by default, but it can be exposed to suit your requirements.

• For more information about multiple business units in opportunities, see the topic, Multiple Business Units in Opportunities: Overview.
• For more information about configuring applications, see the Extending Sales guide.

Multicurrency Support
Opportunities and product lines support multiple currencies, if multiple currencies have been implemented. When a salesperson adds a product or product group to an opportunity, the application uses the opportunity header currency as the default currency on the product line. However, salespeople can override the default currency. For more information about currency setup, see the topic, Setting Up Multiple Currencies: Overview.

Territory Assignment
When you’re using territory-based assignment, the assignment engine automatically assigns territories to product lines. Territory team members on the territories are assigned to product lines based on their membership in the territories. For more information about territory setup, see the topics on setting up territories.

Enabling the Products Subtab in Opportunities
You can expose the Products subtab in the Edit Opportunity page to enable salespeople view more revenue line items at a glance. By default, the Products subtab does not appear in the Edit Opportunity page.

Use the following procedure to expose the Products subtab in the Edit Opportunity page.

1. Sign in as a sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to Application Composer, in the Configuration category.
4. Select Sales.
5. In the navigation tree, expand Standard Objects, expand Opportunity, and click Pages.
6. Ensure that the Simplified Pages tab is selected.
7. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the Duplicate icon.
8. Type a new layout name and click Save and Edit.
   The Details Layout page appears.
9. In the Subtabs Region, click the Hide, Show, or Reorder Subtabs icon.
   The Configure Subtabs dialog box appears.
10. Move Products from the Available Subtabs to the Selected Subtabs window.
11. Click OK.

---

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12. From the Details Layout page, click Done.
13. Make sure that the layout status for your layout is set to Active.
14. Test the changes as follows:
   o Navigate to Sales > Opportunity as a user with access to the opportunity pages, for example, as a salesperson.
   o Edit an opportunity and ensure you can see the Products subtab in the Edit Opportunity page.
15. Publish the sandbox.

For more information, see the related topics in the Extending Sales guide.

**Related Topics**
- Adding and Hiding Subtabs Using Application Composer: Explained

**Forecasted Revenue**

**Forecasted Revenue in Opportunities: Explained**

The application includes opportunity revenue in the current sales forecast based on how the forecast criteria are set by the administrator. You can see which revenue items are included in the forecast and, if enabled by the administrator, include or exclude revenue from the forecast. You can include or exclude an entire opportunity, and thus its revenue from products, if enabled.

**Understanding Forecasted Opportunity Revenue**

You use the Edit Opportunity page revenue (or products) region to view which revenue items are in the current forecast. A check mark in the Forecast column of a revenue line signifies that the revenue will be included in the forecast the next time it is generated.

**Note:** A revenue item marked as forecasted does not necessarily mean that it is already included in the latest forecast. The inclusion is dependent upon when the refresh forecast process was last run. For example, a revenue item may meet the current forecasting criteria, but the latest forecast may have already been submitted when the revenue was added to the opportunity. When the next forecast snapshot is generated, the revenue item will be included, provided it continues to meet the forecast criteria.

Revenue is included in the forecast based on how the administrator has configured the forecast rules. The following outlines some examples of how forecasted opportunity revenue operates:

- Opportunity revenue can be systematically added to the forecast based on a set of global criteria specified during setup.
- **Include in Forecast** drop-down list:
  The administrator can enable a drop-down list called Include in Forecast. The drop-down list appears in both the opportunity and revenue (products) region.
  In the Edit Opportunity page, you can override the criteria for an entire opportunity or for individual opportunity revenue items by using the Include in Forecast drop-down list.
• The application changes the **Include in Forecast** setting dynamically when you make changes to any of the following revenue attributes in the opportunity page. (The corresponding forecast is only updated when you save your changes.)
  ○ Product Group
  ○ Quantity
  ○ Estimated Price
  ○ Revenue
  ○ Win Probability
  ○ Revenue Type
  ○ Expected Revenue
  ○ Status

• The application always includes in the forecast revenue items that have a status category of Won.

## Setting Opportunity Revenue Forecast Criteria

You can control opportunity revenue forecasting criteria and behavior by setting the following two sales forecasting fields:

- **Enable Forecast Criteria Override**: You can control the appearance and behavior of the **Include in Forecast** list of values in the Edit Opportunity header and revenue (products) region.
- **Forecasting criteria**: You can pick one of several different criteria for including revenue in the forecast. After you set criteria, the text, Forecast Criteria, along with the actual criteria, display in the revenue region.

You set these fields in the Select Forecasting Options page, **Unadjusted Forecast Criteria** region. This page is accessible by using the Setup and Maintenance work area and selecting the Forecasting Options task. For a procedure detailing how to create a forecast, see the topic, Creating a Forecast, in the Getting Started with Your Sales Implementation guide.

### Setting Forecast Criteria

Use the following procedure to set forecast criteria:

1. In the Setup and Maintenance work area, go to the following:
   ○ Offering: Sales
   ○ Functional Area: Sales Forecasting
   ○ Task: Select Forecasting Options

2. In the **Unadjusted Forecast Criteria** region of the Select Forecasting Options page, set the criteria as you want.

The remaining sections in this topic describe the impact of setting the criteria fields for opportunity revenue lines.

For more information on the other forecasting setups not covered in this topic, see the help. Use keywords “forecasting” and “forecast”.

### Specifying Forecasting Criteria for Product Lines

You can specify one of several different criteria by which opportunity product line revenue is included in the current forecast. Following are the supported criteria. All of the criteria are fields in the products region of the Edit Opportunity page.

- Estimated Price
• Expected Revenue
• Probability
• Product Group
• Quantity
• Revenue (amount)
• Revenue Type
• Status

Impact of Enabling Forecast Criteria Override

If you check the **Enable Forecast Criteria Override** field in the Select Forecasting Options page, then a choice list appears in the opportunity UI called **Include in Forecast**. The list appears both in the opportunity header area and the products region. Salespeople can use the field to manually add or remove revenue from the current forecast. If the choice list is enabled, salespeople can add revenue to the forecast even if the revenue does not fit the current forecast criteria. Additionally, the behavior in the opportunity UI changes depending upon whether you also have set up forecasting criteria (for example, if you have set up a win probability percentage that must be met before a revenue item gets included).

The following table explains the application behavior if you have set up forecasting criteria in the **Unadjusted Forecast Criteria** region in the Select Forecasting Options page.

<table>
<thead>
<tr>
<th>Enable Forecast Criteria Override Checked</th>
<th>Enable Forecast Criteria Override Unchecked</th>
<th>Forecast Criteria Text Appears in Opportunity UI</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Include in Forecast list of values displays in the UI, allowing sales personnel to select from the following options:</td>
<td>The Include in Forecast list of values does not appear. The default value for revenue items is When matches forecast criteria.</td>
<td>Yes</td>
</tr>
<tr>
<td>• Always</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Never</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• When matches forecast criteria</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The following table explains the application behavior if you have not set forecasting criteria in the **Unadjusted Forecast Criteria** region in the Select Forecasting Options page.

<table>
<thead>
<tr>
<th>Enable Forecast Criteria Override Checked</th>
<th>Enable Forecast Criteria Override Unchecked</th>
<th>Forecast Criteria Text Appears in Opportunity UI</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Include in Forecast list of values displays in the UI, allowing sales personnel to select from the following options:</td>
<td>The Include in Forecast list of values does not appear. The default value for revenue items is When matches forecast criteria.</td>
<td>No</td>
</tr>
<tr>
<td>• Always</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Never</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Related Topics**

• [Accessing Tasks to Update Existing Setup Data: Procedure](#)
Sales Credits

Sales Credits: Overview

Companies use sales credits to report on salesperson performance and quota attainment, to aid in compensation calculation, and to facilitate forecasting by territories. Sales credit recipients and revenue amounts roll up the resource hierarchy for pipeline reporting and quota attainment.

You assign sales credits to sales resources (salespeople or other sales users) while editing product lines in opportunities. When a product line is first added to an opportunity, the application sets the user who added it as the sole sales credit recipient, receiving 100 percent of the sales credit.

There are two types of sales credit in opportunities:

- Revenue sales credit: Typically allocated to salespeople working the deal.
- Overlay sales credit: Typically allocated to other resources helping out with the deal, such as a product or market specialist. Overlay sales credit is also known as nonrevenue sales credit.

Revenue Sales Credit

When assigning revenue sales credits, keep in mind:

- Only internal resources are eligible as revenue credit recipients.
- Revenue sales credits must add up to 100 percent.
- The Forecast Territory can be set to any territory assigned to the product line with Revenue or Revenue and Nonrevenue Forecast Participation.

Overlay Sales Credit

When assigning overlay sales credits, keep in mind:

- Both internal and external (for example, partner) resources are eligible as nonrevenue credit recipients.
- Nonrevenue sales credits do not need to add up to 100 percent.
- If the selected Allocation Style is Proportional to Revenue, the sales credit amounts adjust automatically and proportionally when the product line amount changes.
- If the selected Allocation Style is Ad Hoc Amounts the sales credit amounts do not change with product line amount changes.
- The Forecast Territory can be set to any territory assigned to the product line with Revenue or Revenue and Nonrevenue Forecast Participation.

Note: Territories with a Forecast Participation of Nonforecast are not eligible to be set as the forecast territory on either revenue or nonrevenue sales credits.

Configuring Default Assignment

You can configure the revenue territory assignment defaulting logic to meet your specific business needs for reporting and forecasting the product amounts on an opportunity. See the article, Configuring Credit Recipients and Forecast Territories Assignment (Doc. ID 2089301.1), available on My Oracle Support (support.oracle.com).
Manual Territory Assignment by Administrators
In the sales credits screens, sales administrators can manually assign a sales representative’s territory to a product line when the territory has not been assigned automatically. Manual assignment allows sales personnel to forecast an opportunity immediately while the territory setup is being reviewed and updated.

Related Topics
- Allocating Sales Credits: Procedures
- Sales Credit Recipient and Forecast Territory Defaulting Logic: Explained
- How can I lock in a sales credit recipient
- Deal Protection on Opportunities: Explained

Enabling Sales Credits
To enable sales credit functionality in opportunities, you must set the profile option, Opportunity Sales Credit Enabled (MOO_ENABLE_SALES_CREDITS).

If the value of the profile option is Y, the Sales Credit column displays in the opportunity Products table, and the editable sales credit icon displays on product lines. The sales credits icon lets salespeople access the pages where they assign revenue and non-revenue (overlay) sales credit to other users. For more information, see the related topics.

Prerequisites
Keep in mind the following prerequisites when salespeople assign sales credits in opportunities:
- Territories have been set up and your company is using territories for assignment of opportunity products.
- The user must have Full access to the opportunity in order to assign sales credits.

Setting the Sales Credit Profile Option
Use the following procedure to set the profile option.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Opportunity Profile Options
2. In the search region of the Manage Opportunity Profile Options page, search for the profile option, Opportunity Sales Credit Enabled (MOO_ENABLE_SALES_CREDITS).
3. In the search results, click the profile option name.
4. Set the profile option value to Y.
5. Save your changes.

Related Topics
- Sales Credit Recipient and Forecast Territory Defaulting Logic: Explained
- Allocating Sales Credits: Procedures
- Accessing Tasks to Update Existing Setup Data: Procedure
Recurring Products

Recurring Opportunity Products: Overview

Recurring schedules in opportunities let sales representatives enter and track opportunity products or product groups that are part of a subscription business model.

The subscription business model applies to the sale of goods, software, or services where the customer is required to pay a subscription price for access to the goods, software, or services, with additional usage or pay-as-you-go charges in some cases. Some examples are:

- Data and phone services
- Credit collection or payment processing services
- Software, platform, or data-as-a-service costs
- Magazine subscriptions
- Product life cycle costs
- Engineering and infrastructure services

The subscription model can encompass both business-to-business (B2B) and business-to-consumer (B2C) customers. For example, a telecommunications company may sell mobile phone services to individuals, and multiple phone lines to a business for their employees. The supplier of these services typically charges the customer a periodic rate applicable to the plan that they subscribed to.

After a sales representative defines a schedule for a subscription product or service, the application automatically creates the recurring transactions from the frequency and the number of transactions specified in the schedule. There are several time frequencies to choose from, such as weekly, monthly, quarterly, yearly, and so on. The multiple frequencies make it easy to set up a recurring schedule, like a monthly subscription for three years, or a biweekly annual subscription. Sales representatives can review the automatically-created schedule and quickly add a one-time registration or installation fee, and adjust the amount or date of any transaction.

Subscription changes are easy to manage. If there is a change in the terms or price of the subscription, sales representatives can quickly define a new schedule to replace the previous one. If the original subscription is extended, say, for another year, sales representatives can easily extend the existing schedule on the product for the period that you want.

Product amounts from recurring schedules are summed into the corresponding quarterly or yearly periods, and are readily available in pipeline reports and forecast rollups for sales representatives and sales managers.

Related Topics

- Working with Recurring Opportunity Products: Procedures
- Managing Recurring Revenue

Enabling Recurring Opportunity Products

To enable recurring opportunity products, use Oracle Application Composer to add the Schedule column to the opportunities UI.
For more information about recurring opportunity products functionality, see the related topics.

Adding the Schedule Column
In Application Composer, you add the Schedule column to the edit opportunity page. The schedule icon in the Schedule column is how you access the recurring schedules pages. Use the following procedure.

Note: When modifying the UI, you must make your changes in a sandbox. See the Extending Sales guide for more information about using sandboxes.

1. Sign in as the sales administrator or a setup user, such as application implementation consultant.
2. Create and activate a sandbox to work in.
3. Navigate to Application Composer.
4. In the Application Composer page, select Sales as the object.
5. Expand Standard Objects and navigate to Opportunity, then Pages. The Opportunity: Pages page appears.
6. In the Opportunity: Pages page, ensure that the Simplified Pages tab is active.
7. In the Details Page Layouts region, select the Default Layout in the table and then click the edit icon. The Details Layout: Default Layout page appears. Note that you may be using a different layout than the default one. If this is the case, then select the appropriate layout.
8. In the Edit Revenue Table region, click the edit icon.
9. In the Details Layout: Default Layout: Edit Revenue Table page, find the Schedule field in the Configure Summary Table window. Move the field from the Available Fields window to the Selected Fields window.
10. Click Save and Close.
11. Click Done in the Details Layout: Default Layout page.
12. Validate the change by navigating to the edit opportunity page and ensuring that you can see the Schedule field in the Products table. Note that the user you sign in with to validate the change must belong to a sales resource organization. For example, you must sign in as a sales representative.
13. Publish the sandbox.
14. The Schedule field is now available to sales users in the edit opportunity pages.

Related Topics
- Working with Recurring Opportunity Products: Procedures

Modifying Fields for Recurring Opportunity Products
You can add fields to the recurring schedules UI in opportunities. You can also rearrange the frequency values that salespeople can choose from when creating a recurring schedule.

For more information about recurring opportunity functionality, see the related topics.

Configuring Additional Fields
You can use Oracle Page Composer to enable additional fields in the recurring schedule UI, to meet your specific requirements.

The fields you can rename using Page Composer are:

- Expected Revenue
- Status
• Win Loss Reason
• Estimated Price
• Best Case
• Worst Case
• Win Probability
• Additional Number 1
• Additional Amount 1
• Additional Text 1
• Additional Text 2

**Note:** To perform this procedure, you must have already enabled the Schedule icon in the Products table in the Edit Opportunity page. For more information, see the topic, Enabling Recurring Opportunity Products.

To enable these fields:

1. Sign in as a setup user.
2. Click **Navigator > Sales > Opportunities**.
3. Create and activate a sandbox to work in.
4. Click your user name in the global header and select **Edit Pages**.
5. Select a layer that you want to modify. For example, you can make the changes available only to users with a specific job role, such as sales representatives. Click **OK** to commit the modified layer.
6. When modifying work areas, you start in the Design view. Design view lets you navigate to the component you want to modify.
7. Click an opportunity to edit it.
   - The Edit Opportunity page appears.
8. Click the **Schedule** icon in the Products table.
   - The Manage Schedule page appears.
9. Click **Select**.
10. Hover over the last column in the Transactions table header row until a border appears. Click the edge of the border.
11. In the menu that appears, click **Edit Parent Component**.
   - The Component Properties window appears.
12. Click the **Children** tab.
13. Select the fields you want to enable.
14. Click **Close** to save.

You can use a similar procedure to modify the Set Schedule Page.

For more information about using Application Composer and Page Composer, see the Extending Sales guide.

**Changing the Display Order of Frequencies**

When salespeople create a recurring schedule, they must select a value, such as monthly, from the Frequency field. You can change the display order of the frequencies that display in the list. For example, you can make the Monthly value the first one in the list. You make these changes by modifying the supplied lookup type, MOO_RECURRING_FREQUENCY.

Use the following procedure.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
Functional Area: Opportunities
  Task: Manage Standard Lookups

2. In the Lookup Type field of the Manage Standard Lookups page, enter MOO_RECURRING_FREQUENCY and search. Or, you can enter Sales Recurring Revenue Frequency in the Meaning field and search.

3. In the list of values, reorder the items as needed by changing the numbering in the Display Sequence column. The value that has the lowest display sequence is the one that is set as the default value.

4. Click Save and Close.

Related Topics
  • Working with Recurring Opportunity Products: Procedures
  • Accessing Tasks to Update Existing Setup Data: Procedure

Additional Implementation Considerations for Revenue

Synchronization of Opportunity and Product Line Attributes: Explained

Opportunities and their product lines share common attributes, for example, status or win probability percentage. For several attributes, under certain conditions, the application automatically synchronizes them so that they are the same. In addition, the application updates certain opportunity and product line attributes based on the values of other attributes.

The attributes that the application synchronizes or updates automatically are:

- Win probability
- Close date
- Include in forecast setting
- Status
- Win/loss reason
- Competitor

Note: An attribute is said to be synchronized if its opportunity and product line values are the same, and if the product line is in the same status category as its opportunity. If a product line and its opportunity both have undefined values, they are considered to have the same value.

Opportunity and Product Line Attribute Synchronization

The application synchronizes certain product line attributes based on the opportunity-level attribute, under certain conditions. Synchronization occurs for the following attributes:

- Win probability
- Close date
- Include in forecast setting
- Status (not status category)
Consider the following example of close date synchronization:

- An opportunity with an Open status category has a close date of July 14, 2018.
- Product lines 1, 2, and 3 have the same close date and they are in the same status category.
- Product line 4 has a different close date, but the same status category.
- The close date of the opportunity is changed to August 14, 2018. The application automatically sets the close dates of product lines 1, 2, and 3 to the same close date as that of the opportunity. The close date of product line 4 remains unchanged, because it has close date that was not already synchronized with that of the opportunity.

**Opportunity Status Updates**
The following scenarios explain what happens when the opportunity status is updated:

- Opportunity status is updated to a Won status:
  - The application updates the opportunity win probability to 100 percent. It also updates all synchronized product lines’ win probability to 100 percent.
- Opportunity status is updated to a Lost or No Sale status:
  - The application updates the opportunity close date to the current date. It does not update the close date on synchronized product lines.
- Opportunity status is updated from an Open status to a Closed status:
  - The application enables the opportunity win/loss reason attribute.
  - If an opportunity primary competitor has been defined, the application updates the product line competitor to the opportunity primary competitor for all opportunity product lines, if they are not already defined. This action applies only to the close opportunity and mass update opportunities flows.
- Opportunity status is updated from a Closed status to an Open status:
  - The application disables the opportunity win/loss reason attribute.
  - The application sets the opportunity win/loss reason attribute to "undefined". It does not update the win/loss reason on synchronized product lines.

**Product Line Status Updates**
The following scenarios explain what happens when the product line status is updated:

- Product line status is updated to a Won status: The application sets the product line win probability to 100 percent.
- Product line status is updated to a Lost or No Sale status: The application sets the product line close date to the current date.
- Product line status is updated to a Closed status: The application enables the product line win/loss reason attribute.
- Product line status is updated to an Open status:
  - The application disables the product line win/loss reason attribute.
  - The application updates the product line win/loss reason attribute to "undefined".

**Opportunity Win/Loss Reason Updates**
When an opportunity is in an Open status, the opportunity win/loss reason attribute is disabled. Win/loss reason is activated when the opportunity is set to a Closed status. When the opportunity win/loss reason is updated, the application updates all opportunity product lines where the win/loss reason attribute is synchronized.
Opportunity and Product Line Competitor Updates

If a primary competitor has been defined at the opportunity level, when the opportunity status changes from an Open status to a Closed status, the application updates the product line competitor to the primary competitor for all lines that don’t already have a competitor.

Tip: If a product line without a competitor is set to closed and the opportunity is saved, the application displays a dialog box that allows you to copy the opportunity primary competitor to the product lines without competitors.

This action applies only to edit opportunity and close opportunity flows, not to the mass update flow.

Related Topics

- Product Line Synchronization with Win Probability: Example

Adding Attributes for Opportunity Summary and Revenue Lines Synchronization

You can enhance and perform opportunity summary and revenue line synchronization for some attributes using Groovy scripting. Use the sample scripts in this topic to add rule definitions to the predefined opportunity cascading logic. The rule definitions keep opportunity summary and revenue lines in synchronization with each other.

To add specific attributes for opportunity summary and revenue lines synchronization, do the following:

1. Sign in as a sales administrator or a setup user.
2. Navigate to Application Composer.
3. Select Sales to filter the object search.
4. Expand Standard Objects and then expand Opportunity.

The Server Scripts Help Request page opens.

6. Under Validation Rules tab, select Action - Add under the Field Rules region and enter values as shown in the following example:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Name</td>
<td>Choose the field or attribute that you want from the drop-down list of values.</td>
</tr>
<tr>
<td>Rule Name</td>
<td>Enter a meaning full name for the rule.</td>
</tr>
<tr>
<td>Error Message</td>
<td>Enter a user-defined error message, for example, a message that warns the user the synchronization cascade has failed.</td>
</tr>
<tr>
<td>Rule Definition</td>
<td>In the script text field, cut and paste the script that you have written to validate the condition. For example, see the sections Sample Groovy Scripts for Opportunity Attributes and Sample Groovy Scripts for Opportunity Revenue Attributes in this topic for sample groovy scripts.</td>
</tr>
</tbody>
</table>

7. Click Save and Close.

For a more detailed explanation of Groovy scripting using Application Composer, see the Groovy Scripting Reference Guide.
### Sample Groovy Scripts for Opportunity Attributes

The following table contains sample groovy script code for a subset of opportunity attributes:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Sample Groovy Script</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close Date</td>
<td><code>cascadeInSyncValueToAllRevenues(&quot;EffectiveDate&quot;, oldValue, newValue)</code> return true</td>
</tr>
</tbody>
</table>
| Status and StatusCodeSetId       | // For Status def cache_name = '_statuscode_insync_cascade'
|                                  | if (oldValue == 'OPEN' && newValue == 'WON')
|                                  | { Only allow synchronization cascade if Status moved from OPEN to WON.  
|                                  | cascadeInSyncValueToAllRevenues("StatusCode", oldValue, newValue)  
|                                  | // Mark this opportunity's StatusCode as having been synchronization cascaded  
|                                  | adf.userSession.userData.put(getAttribute('OptyId') + cache_name, true)
|                                  | // mark this opportunity as having status just cascaded.  
|                                  | } return true  
|                                  | // For StatusCodeSetId def cache_name = '_statuscode_insync_cascade'
|                                  | insync_cascade = adf.userSession.userData[getAttribute('OptyId')]
|                                  | + cache_name]println("StatusCodeSetId: insync_cascade = " + insync_cascade)  
|                                  | insync_cascade = (insync_cascade == null) ? false : insync_cascade  
|                                  | // ensure insync_cascade is either true/false try
|                                  | { if (insync_cascade)
|                                  | { cascadeInSyncValueToAllRevenues("StatusCodeSetId", oldValue, newValue)  
|                                  | // only cascade if the Status has just been cascaded.  
|                                  | } }
|                                  | Finally
|                                  | { adf.userSession.userData.remove(getAttribute("OptyId") + cache_name) }  
|                                  | return true  
| Win/Loss and ReasonWonLostCodeSetId | // For Win/Loss Reason def cache_name = '_winlosreason_insync_cascade'
|                                   | if (oldValue == 'INSTALL_BASE' && newValue == 'TEST_VO_1')
|                                   | { cascadeInSyncValueToAllRevenues("ReasonWonLostCode", oldValue, newValue)  
|                                   | // Mark this opportunity's WinLossReason as having been synchronization cascaded  
|                                   | adf.userSession.userData.put(getAttribute('OptyId'), cache_name, true)  
|                                   | // mark this opportunity as having status just cascaded.  
|                                   | }
|                                  | // For ReasonWonLostCodeSetId def cache_name = '_winlosreason_insync_cascade'
|                                  | insync_cascade = adf.userSession.userData[getAttribute('OptyId')]
|                                  | + cache_name]println("ReasonWonLostCodeSetId: insync_cascade = " + insync_cascade)  
|                                  | insync_cascade = (insync_cascade == null) ? false : insync_cascade  
|                                  | // ensure insync_cascade is either true/false try
|                                  | { if (insync_cascade)
|                                  | { cascadeInSyncValueToAllRevenues("ReasonWonLostCodeSetId", oldValue, newValue)  
|                                  | } }
Sample Groovy Scripts for Opportunity Revenue Attributes

The following table contains sample groovy script code for a subset of opportunity revenue attributes:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Sample Groovy Script</th>
</tr>
</thead>
<tbody>
<tr>
<td>Win Probability</td>
<td><code>cascadeInSyncValueToAllRevenues(&quot;WinProb&quot;, oldValue, newValue)</code></td>
</tr>
<tr>
<td></td>
<td><code>return true</code></td>
</tr>
<tr>
<td>Sales Channel</td>
<td><code>cascadeInSyncValueToAllRevenues(&quot;SalesChannelCd&quot;, oldValue, newValue)</code></td>
</tr>
<tr>
<td></td>
<td><code>return true</code></td>
</tr>
<tr>
<td>Include Forecast</td>
<td><code>cascadeInSyncValueToAllRevenues(&quot;SalesChannelCd&quot;, oldValue, newValue)</code></td>
</tr>
<tr>
<td></td>
<td><code>return true</code></td>
</tr>
</tbody>
</table>

Adding Status Categories for Open Revenue: Explained

You can specify additional revenue line status categories to include when the application calculates opportunity amount. By default, the application only includes revenue lines in Open status when calculating the opportunity summary amount. However, you can include, for example, both won and open lines by modifying the lookup type, Open Opportunity Rollup Status Mapping.

Use the following procedure to modify the Open Opportunity Rollup Status Mapping lookup type:

1. Sign in as a setup user or sales administrator.
2. Click Navigator > Setup and Maintenance.
3. In the Setup page, select the Sales offering.
4. Select the Opportunities functional area.
5. Click the Tasks icon and then click Search to open the Search page.
6. Search for and select the Manage Standard Lookups task.
7. In the Manage Standard Lookups page, enter Open Opportunity Rollup Status Mapping in the Meaning field. The lookup type code, which you can search for in the Lookup Type field, is ORA_MOO_OPEN_ROLLUP_MAPPING.
8. Add the new lookup code. For example, add a code called **WON**.

   - Use **Enabled** to enable or disable a specific lookup code.
   - Update the meaning (display name), start date, end date, or display sequence of any of the predefined values.
   - Add or remove lookup codes, as long as they follow the correct lookup code formatting.

   **Note:** The OPEN category cannot be modified.

9. Click **Save and Close**.

After you make the changes, the opportunity summary amount calculation will include all revenue lines in OPEN status category, as well as any other status categories you have added and enabled.

**Related Topics**

- **Lookup Types: Explained**

How can I disable opportunity to revenue line synchronization logic?

By default, opportunity cascading logic keeps opportunity summary and revenue lines in synchronization with each other. If you no longer want opportunity summary and revenue lines to be synchronized, open the **Opportunity Synchronization Cascade Enabled** profile option (MOO_ENABLE_INSYNC_CASCADE) and set the value to **N**. Note that you can enhance and perform opportunity summary and revenue line synchronization for some attributes using Groovy scripting if you choose to disable the predefined opportunity summary and revenue lines synchronization.
21 Setting Up Competitors

Sales Competitors: Overview

Use the sales competitors pages to store information about the sales competition. As a sales administrator, you create the competitor profiles. Salespeople then can associate competitors with opportunities, associate product groups with competitors, and view competitor details.

The key features of managing competitors include the following:

- Competitor profile: Store several aspects of competitor companies, such as name, URL, threat level, and industries and geographies where the competitors are doing business.
- Internal experts: Associate with competitors people from your company who are considered experts about the associated competitor.
- Collateral: Attach relevant competitor documents. After you store them, salespeople can access the competitive collateral to position products or solutions against competitors.
- Competitors in opportunities: Associate competitor information with opportunities, both at the opportunity level and at the product-line level. After salespeople associate a competitor with an opportunity, the competitor profile shows opportunities where the competitor is present.
- Notes: Create free-form notes about the competitor.
- Revenue at stake: The competitor profile displays revenue at stake, which is potential opportunity revenue where the competitor is present.
- Analytics and reports: Access several analytics and reports around competitor data, such as win/loss trends. For more information, refer to the sales Creating and Administering Analytics guide.

Note: Depending on the setting of the profile option, Close Opportunity Competitor Required, salespeople may be required to enter a competitor when closing an opportunity. See the topic, Setting the Close Opportunity Profile Options, for more information.

Managing Sales Competitors: Procedures

Use the procedures in this topic as you create and maintain information on sales competitors. Note that these procedures are for sales administrators. Separate procedures and information exist for sales users, such as salespeople.

Creating Competitors

Use the following procedure to create a competitor.

1. Sign in as the sales administrator and select Competitors from the Navigator. The Review Competitors page appears.
2. Select the Create icon, or select Create from the Actions menu. The Create Competitor page appears.
3. In the fields, enter or select values. The following table describes the fields.
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Name</td>
<td>Name of the competitor.</td>
</tr>
<tr>
<td>Name Suffix</td>
<td>Value appended to the name of the Organization Name for the competitor.</td>
</tr>
<tr>
<td>Chief Executive Name</td>
<td>Name of the competitor company’s chief executive officer or highest-level employee.</td>
</tr>
<tr>
<td>Line of Business</td>
<td>Line of business of the competitor company’s products.</td>
</tr>
<tr>
<td>D-U-N-S Number</td>
<td>Dun &amp; Bradstreet Corporation unique nine-digit identification number for the competitor company.</td>
</tr>
<tr>
<td>Organization Size</td>
<td>Size of the competitor company.</td>
</tr>
<tr>
<td>Year Established</td>
<td>Year the competitor company was first started.</td>
</tr>
<tr>
<td>Threat Level</td>
<td>Perceived threat level of the competitor in closing deals, such as low, medium, and high.</td>
</tr>
<tr>
<td>Year Incorporated</td>
<td>Year the competitor company was first incorporated.</td>
</tr>
<tr>
<td>Stock Symbol</td>
<td>Stock symbol for the competitor company in the financial markets.</td>
</tr>
<tr>
<td>Fiscal Year End Month</td>
<td>Month that the competitor company closes its fiscal year.</td>
</tr>
<tr>
<td>Dun &amp; Bradstreet Corporation Credit Rating</td>
<td>Credit rating of the competitor company with Dun &amp; Bradstreet Corporation.</td>
</tr>
<tr>
<td>Privately Owned</td>
<td>Indicates the competitor company is privately owned.</td>
</tr>
<tr>
<td>Minority Owned</td>
<td>Indicates that the competitor company is minority owned.</td>
</tr>
<tr>
<td>Small Business</td>
<td>Indicates that the competitor company is a small business.</td>
</tr>
<tr>
<td>Status</td>
<td>Status of the competitor record, either active or inactive.</td>
</tr>
</tbody>
</table>

4. When you’re finished entering the competitor details, click **Save and Close** or **Save and Edit**.

**Note:** Upon saving, if you get an error that a matching company has been found in the application, then respond to the dialog box by either merging this record with the existing one or creating a new organization in the application.

In addition to performing the procedures in this topic, you can also associate product groups with competitors. The product groups then appear in the Product Groups tab in the Edit Competitor page for a specific competitor. The ability to associate product groups with competitors is available only if the desktop UI customer center pages are available in your implementation. See the topic, Associating Competitors with Product Groups: Procedure, for more information.
Entering SWOT for a Competitor

You can assign strength, weakness, opportunity, and threat (SWOT) levels for competitors. Recording and reviewing SWOT levels helps you understand, plan, and craft an effective competitive strategy when facing a competitive threat on a deal.

Use the following procedure to enter SWOT for a competitor.

1. Sign in as the sales administrator and, from the Navigator, select Competitors.
   The Review Competitors page appears with a list of competitors.
2. In the list, select the name of the competitor.
   The Edit Competitor page appears.
3. In the SWOT table, add a new table row by clicking the add icon or selecting Add Row from the Actions menu.
4. In the new table row, select or enter the following values:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Indicates the type of SWOT value, such as a threat or weakness.</td>
</tr>
<tr>
<td>Description</td>
<td>Used to describe the type of SWOT.</td>
</tr>
<tr>
<td>Comments</td>
<td>Additional comments for the SWOT value.</td>
</tr>
</tbody>
</table>

5. Save your changes. The SWOT values are fully editable after you create them.

Viewing Competitor Opportunities

After salespeople associate a competitor with an opportunity while editing or closing it, the opportunities are automatically added to the competitor profile. The list of opportunities in a competitor’s profile is a consolidated view of past and current opportunities where the competitor is present. The opportunity data provides you with useful insight to plan appropriate sales strategies.

Use the following procedure to view competitor opportunities.

1. Sign in as the sales administrator and, from the Navigator, select Competitors.
   The Review Competitors page appears with a list of competitors.
2. In the list, select the name of the competitor.
   The Edit Competitor page appears.
3. Click the Opportunities tab.
4. The Opportunities table shows all opportunities where the competitor is present.

Associating Attachments with a Competitor

You can attach files, free-form text, or URLs to a competitor record. Attachments let you provide additional details about the competitor.

Use the following procedure to attach files, text, or URLs to a competitor.

1. Sign in as the sales administrator and, from the Navigator, select Competitors.
The Review Competitors page appears with a list of competitors.

2. In the list, select the name of the competitor.

The Edit Competitor page appears.

3. Click the **Attachments** tab.

4. In the Attachments table, add a new table row by clicking the add icon or selecting **Add Row** from the Actions menu.

5. In the new table row, select or enter the following values:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Indicates the type of attachment, either a file, free-form text, or a URL.</td>
</tr>
<tr>
<td>File Name or URL</td>
<td>○ If you selected File as the type, you can browse to the file on your computer.</td>
</tr>
<tr>
<td></td>
<td>○ If you selected Text as the type, use to enter free-form text.</td>
</tr>
<tr>
<td></td>
<td>○ If you selected URL as the type, use to enter the URL of the competitor’s web site.</td>
</tr>
<tr>
<td>Title</td>
<td>Title of the attachment.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the attachment.</td>
</tr>
</tbody>
</table>

6. Save your changes.

### Associating Internal Experts with a Competitor

Internal experts are people in your company who are experts on a competitor.

Use the following procedure to associate internal experts with a competitor.

1. Sign in as the sales administrator and, from the Navigator, select **Competitors**.

The Review Competitors page appears with a list of competitors.

2. In the list, select the name of the competitor.

The Edit Competitor page appears.

3. Click the **Internal Experts** tab.

4. In the Internal Experts table, add a new table row by clicking the add icon or selecting **Add Row** from the Actions menu.

The Search and Select: Internal Expert dialog window appears.

5. Search for and select the person.

6. In the search dialog window, click **Apply** and then **Done**.

7. Save your changes. The table displays the details of the internal expert, such as his e-mail address and phone number.

### Associating Geographies or Industries with a Competitor

You can associate geographical locations, such as a country, with a competitor in order to record this type of additional information about a competitor. The stored geographies are locations where the competitor is present. The available
geographical locations are those that are defined in your application. You also can store the industries where the competitor competes with your company. The available industries are those that are defined in your application.

Use the following procedure to associate geographies or industries with a competitor.

1. Sign in as the sales administrator and, from the Navigator, select Competitors.
   
   The Review Competitors page appears with a list of competitors.

2. In the list, select the name of the competitor.
   
   The Edit Competitor page appears.

3. Click the Geographies tab. Or, if entering industries, click the Industries tab.

4. In the table, add a new table row by clicking the add icon or selecting Add Row from the Actions menu.

5. Search for and select the geographical location or industry.

6. In the search dialog window, click OK.

7. Save your changes.

Adding Notes to a Competitor Profile

You can add free-form notes to a competitor profile. Use the following procedure.

1. Sign in as the sales administrator and, from the Navigator, select Competitors.
   
   The Review Competitors page appears with a list of competitors.

2. In the list, select the name of the competitor.

   The Edit Competitor page appears.

3. In the contextual area of the page on the right, in the Notes area, click the create icon.

4. Enter the free-form note and save your changes.

Related Topics

- Sales Competitors: Explained

Enabling Competitor UI Elements in Opportunities

To allow salespeople to manage competitors within opportunities, you must enable the relevant UI elements using Oracle Application Composer. Use the procedures in this topic to make the UI changes.

Enable the following UI elements in opportunities to support the management of competitors. Note that all of these UI elements are hidden by default.

- Competitors subtab: Enable the Competitors subtab within the Edit Opportunity page.

- Primary Competitor or Competitors field: Enable the Primary Competitor or Competitors fields in the Edit Opportunity page. Note you likely want to enable either the Competitors subtab or the Primary Competitor field, but not both at the same time.

- Product-line-level Competitors field: Add the Competitors column to the Products table within the Edit Opportunity page.

For more information about how salespeople manage competitors, see the related topics.
Adding the Competitors Subtab

Use the following procedure to add the Competitors subtab to the Edit Opportunity page:

1. Sign into the application as the sales administrator or a setup user, such as application implementation consultant.
2. Create and activate a sandbox to work in.
3. Navigate to Application Composer.
5. In the Opportunity: Pages page, ensure that the Simplified Pages tab is active.
6. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the Duplicate icon.
7. Type a new layout name and click Save and Edit. The Details Layout page appears.
8. In the Subtabs Region, click the Hide, Show, or Reorder Subtabs icon. The Configure Subtabs dialog box appears.
9. Move Competitors from the Available Subtabs to the Selected Subtabs window.
10. Click OK.
11. Back in the Details Layout page, click Done.
12. Be sure that the layout status for your user-defined layout is Active.
13. Validate the change by navigating to the edit opportunity page as a sales user, such as a salesperson, and ensure that you can see the Competitors subtab in the Edit Opportunity page.
14. Publish the sandbox.

Adding Competitor Fields to the Edit Opportunity Page

Use the following procedure to add either the Competitors or Primary Competitor fields to the Edit Opportunity page.

1. Sign into the application as the sales administrator or a setup user, such as application implementation consultant.
2. Create and activate a sandbox to work in.
3. Navigate to Application Composer.
5. In the Opportunity: Pages page, ensure that the Simplified Pages tab is active.
6. In the Details Page Layouts region, select the Standard Layout in the table and then click the Duplicate icon. The Duplicate Layout dialog box appears.
   
   Note that you may be using a different layout than the default one. If this is the case, then select the appropriate layout.
7. Enter a name for the new layout and click Save and Edit. The application returns you to the edit page for the new layout.
8. In the Summary region, click the edit icon.
9. In the Details Layout: <Layout>: Edit Summary page, find the Competitors field or the Primary Competitor field in the Configure Detail Form region. Move the field from the Available Fields window to the Selected Fields window.

   Note: You may see duplicate fields in the list. Hover over them to see the hover text. For Primary Competitor, select the one whose hover text reads PrCmpPartyId. This selection ensures that the Primary Competitor field is editable, thus allowing users to select different competitors for different product lines. If you don’t want users to be able to set different competitors on product lines, then enable the other Competitor field (with the hover text Party Name1).
10. Click Save and Close.
11. Validate the change by navigating to the edit opportunity page as a sales end user, such as a salesperson, and ensuring that you can see the applicable field in the edit page.
12. Publish the sandbox.

Adding the Competitor Column to the Products Table

Use the following procedure to add the Competitor column to the opportunity Products table.

1. Sign into the application as the sales administrator or a setup user, such as application implementation consultant.
2. Create and activate a sandbox to work in.
3. Navigate to Application Composer.
5. In the Opportunity: Pages page, ensure that the Simplified Pages tab is active.
6. In the Details Page Layouts region, select the Standard Layout in the table and then click the Duplicate icon. The Duplicate Layout dialog box appears.

   Note that you may be using a different layout than the default one. If this is the case, then select the appropriate layout.

7. Enter a name for the new layout and click Save and Edit. The application returns you to the edit page for the new layout.
8. In the Edit Revenue Table region, click the edit icon.
9. In the Details Layout: <Layout>: Edit Revenue Table, find the Competitor field in the Configure Summary Table window. Move the field from the Available Fields window to the Selected Fields window.

   ★ Note: You will see two Competitor fields in the list. Hover over the first one and ensure the hover text reads PrCmptPartyId. This selection ensures that the Competitor field is editable, thus allowing users to select different competitors for different product lines. If you don’t want users to be able to set different competitors on product lines, then enable the other Competitor field (with the hover text Party Name1).

10. Click Save and Close.
11. Validate the change by navigating to the edit opportunity page as a sales end user, such as a salesperson, and ensuring that you can see the Competitor field in the Products table.
12. Publish the sandbox.

Related Topics

- Sales Competitors: Explained
- Associating Competitors with Opportunities: Procedures
22 Setting Up Assessments

Assessments: Overview

Assessments let salespeople evaluate the condition of a business object, such as an opportunity or lead. Administrators define assessment templates that consist of questions with scored responses and then make the assessments available in the applications. During the assessment process, the salesperson is presented with assessment questions. Responding to the questions provides the salesperson with immediate scoring and recommendations or follow-up business processes.

Assessments can consist of the following components:

- Questions
- Question ratings
- Responses, including free-form responses
- Scoring of the assessment
- Tasks to be performed based on feedback score

Initial Tasks for Assessments

Creating Assessment Templates: Procedure

You can use assessment templates to analyze the condition of your business objects, such as opportunities or leads. This topic explains the various tasks involved in creating an assessment template.

The following table lists the business objects that support assessment templates, along with the setup task that you must use to create templates for each object.

<table>
<thead>
<tr>
<th>Business Object</th>
<th>Task Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts</td>
<td>Manage Customer Center Assessment Template</td>
</tr>
<tr>
<td>Opportunities</td>
<td>Manage Opportunity Assessment Templates</td>
</tr>
<tr>
<td>Leads</td>
<td>Manage Sales Lead Assessment Template</td>
</tr>
</tbody>
</table>

Note: In this topic, the Opportunity business object is used as an example. However, the procedure to create assessment templates is the same for all objects.

1. In the Setup and Maintenance work area, go to the following:
   a. Offering: Sales
   b. Functional Area: Opportunities
Task: Manage Opportunity Assessment Templates

2. Search for and select the assessment template setup task for the applicable business object. For example, search for and select the Manage Opportunity Assessment Templates task.

An assessment template page appears. For example, the Manage Opportunity Assessment Templates page appears.

Entering Assessment Template Basic Details

To create an assessment template for a business object, start by entering the basic details:

1. In the relevant business object’s assessment template page, click the **Create** icon.
2. In the assessment template details page, enter the details shown in the following table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter a name for the template.</td>
<td>Discount Eligibility</td>
</tr>
<tr>
<td>Template Type</td>
<td>Select the type of template that you want to create.</td>
<td>Opportunity</td>
</tr>
<tr>
<td></td>
<td>The template type options will vary depending on the object that you are</td>
<td></td>
</tr>
<tr>
<td></td>
<td>creating the template for. For example, if you are creating an assessment</td>
<td></td>
</tr>
<tr>
<td></td>
<td>template for opportunities, only the template types meant for opportunities,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>such as Opportunity, Opportunity Product, and Opportunity Contact are visible.</td>
<td></td>
</tr>
<tr>
<td>Template Set</td>
<td>Select the template set.</td>
<td>Common Set</td>
</tr>
<tr>
<td></td>
<td>A template set is a reference data set that contains one or more business</td>
<td>Selecting Common Set makes the</td>
</tr>
<tr>
<td></td>
<td>units (BUs). Selecting the template set ensures that the template is</td>
<td>template available for all BUs.</td>
</tr>
<tr>
<td></td>
<td>available for use only to those BUs that are part of this template set.</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Optionally, provide a description.</td>
<td>Discount eligibility assessment.</td>
</tr>
</tbody>
</table>

3. Add attachments if there is any information that might help the salesperson. For example, add a .pdf file that contains information that might be helpful.
4. Click **Next**.

   The Configure Ratings page appears.

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.

To add a rating:

1. Click the **Add Row** icon and enter **Text** and **Description**.
2. Click **Next**.

   The Enter Questions and Responses page appears.
To modify a rating, just replace the text in the **Text** field.

### Entering Questions and Responses

In this step, you create questions and responses, and also set a rating for each of the question responses.

The score range for ratings is derived automatically in the next step of the assessment template creation process based on the rating you set here.

To create questions and responses:

1. Click the **Create** icon and select **Create Question Group**.

   **Note:** All questions must be part of a question group.

2. In the Create Question Group dialog box, enter **Name** and **Description**. For example, enter **Deal** and **Question group for deals** respectively.

3. Click **Save and Close**.

4. Click the **Create** icon and select **Create Question**.

5. In the Create Question dialog box, enter details as shown in the following table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Question</td>
<td>Enter a question that you want in the assessment template.</td>
<td>How soon will the implementation start?</td>
</tr>
<tr>
<td>Question Group</td>
<td>Select the question group to which this question should belong.</td>
<td>Opportunity Question Group</td>
</tr>
<tr>
<td>Weight</td>
<td>Enter the weight for this question. Weight determines the relative importance of a question within the assessment template. The higher the weight for a question, the more important this question is compared to the other questions in the template. The sum of weights for all questions in a template must be 100.</td>
<td>50 This indicates that this question has 50% importance compared to other questions in the template.</td>
</tr>
<tr>
<td>Description</td>
<td>Optionally, provide a description.</td>
<td></td>
</tr>
</tbody>
</table>

6. Click **Save and Close**.

   **Note:** In the **Question Details** section, select the **Include Free-Form Response Option** check box only if you have a question that supports a free form response. Selecting this option adds a default response in the **Possible Responses** section. Free-form responses are recorded as comments in consuming applications, and they are not scored.
7. In the **Possible Responses** section, click the **Add** icon.

8. Enter details as shown in the following table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Response</strong></td>
<td>Enter a response that the user can select for this question.</td>
</tr>
<tr>
<td><strong>Score</strong></td>
<td>Add the score that you want to allocate to each of these responses.</td>
</tr>
</tbody>
</table>
| **Normalized Score** | This appears automatically once you fill in the score.  
                      The response that has the highest score gets a 100%. |
| **Rating**       | Define the rating that you want to assign to each of the responses. |
| **Description**  | Optionally, provide a description.                |

The following table shows an example of the possible responses:

<table>
<thead>
<tr>
<th>Response</th>
<th>Score</th>
<th>Normalized Score</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 to 3 months</td>
<td>5</td>
<td>25</td>
<td>Poor</td>
</tr>
<tr>
<td>4 to 6 months</td>
<td>10</td>
<td>50</td>
<td>Average</td>
</tr>
<tr>
<td>7 to 12 months</td>
<td>15</td>
<td>75</td>
<td>Good</td>
</tr>
<tr>
<td>&gt; 1 year</td>
<td>20</td>
<td>100</td>
<td>Excellent</td>
</tr>
</tbody>
</table>

9. Similarly, create all the questions that you want to include in this template along with the possible responses.

10. Click **Next**.

The **Edit Question Weights** page appears.

**Editing Question Weights**

You can use this page to verify the weights that you entered for all the questions in the previous step. Check whether the weight total aggregates to 100. If not, you must update the weights to reach a total of 100. You can also use this page to edit the weights of questions.

Click **Next**. The **Configure Score Range Attributes** page appears.

**Configuring Score Range Attributes**

Depending on the scoring to response mapping in the questions and responses that you entered earlier, score ranges for ratings are automatically derived here. You can select the **Override score ranges** check box to edit the automatically derived score ranges and set different start and end scores for the ratings. You can modify the colors shown in the various score ranges.
Based on the assessment score, feedback can be displayed for the assessment in the consuming application, such as in opportunities. To provide feedback, enter the feedback in the **Feedback** field. For example, if the score is 95 and it maps to **Excellent** as rating, you could enter feedback such as **Qualified for discount pending manager approval**.

Click **Save and Close**.

You have now completed creating your assessment template.

**Additional Implementation Steps**

Once your assessment template is ready, you might have to perform some additional implementation steps before the template is available for the user.

For opportunities, you must attach the template to a sales stage within a sales method:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Sales Methods and Sales Stages

2. In the Manage Sales Methods page, create or edit a sales method, and then add or edit sales stages.

3. In the Create or Edit Sales Stage page, navigate to the **Assessment Templates** region.

4. Click **Add**.

5. Search for the template you want to associate with the sales stage and add the template.

When an opportunity is in the relevant sales stage, the sales representative can use the associated assessment templates from the **Assessments** subtab.

**Related Topics**

- Configuring Sales Methods and Stages
- Accessing Tasks to Update Existing Setup Data: Procedure

**Implementation Concepts for Assessments**

**Assessment Template Components: How They Fit Together**

The question weight, response score, and response rating are the assessment template components. They fit together to calculate and display the overall assessment score, rating, and feedback text.

The assessment multiplies a question weight by a response score to achieve a weighted score for an assessment template response. It adds the weighted scores for all responses together to determine the total assessment score. This score falls within a score range calculated in advance, that is associated with a response rating and feedback text. Therefore, the
score range within which the total assessment score falls determines the rating and feedback text to display for a completed assessment.

**Question Weight**

The question weight is the relative importance of a question within an assessment template. The template expresses it as a percentage. All of the question weights within a template must total to exactly 100. When you use an assessment template, the template multiplies a question’s weight by the score of the question response to produce a weighted score for that response.

**Response Score**

A response score is the score that the template administrator assigns to a possible question response in the template. The template administrator sets response scores with no upper or lower bounds. The template normalizes each score to accurately score an assessment that uses the template. The template normalizes the response scores by assigning a score of
100 to the highest response score. The template then assigns all other responses a normalized score relative to that highest score.

When you use an assessment template, the template multiplies the normalized score of the question response by the question’s weight to produce a weighted score for that response.

**Response Rating**

A response rating is:

- The rating assigned to a possible response to a question in the template.
- A textual qualification, such as Excellent or Poor that provides a metric other than a numeric score for qualifying the outcome of an assessment.

A response rating relates directly to a response score, and this relationship should ensure that a higher score translates to a higher rating.

Early in the template creation process, the administrator configures ratings to assign to responses. The administrator then assigns scores and ratings to responses, and the application calculates score ranges based on those entries. The application assigns each rating to a score range, and gives the administrator the opportunity to apply feedback text to the rating-score range combination.

When you use an assessment template, the template adds the weighted scores from all responses to determine the total assessment score. That score falls somewhere within the calculated score ranges. These ranges then determine which rating the template assigns to the assessment and what feedback text to display. The maximum total assessment score is 100.

**Setting Up Assessment Templates: Points to Consider**

You can implement assessment templates to let salespeople analyze the health of a business object, such as a lead or an opportunity, and suggest appropriate next steps based on its diagnosis. To best plan and create assessment templates, you should consider the following points:

- Ratings
- Questions, question groups, and question weights
- Responses and scores
- Associated task templates

**Ratings**

A rating is a textual qualification, such as Excellent. There are three delivered ratings in the assessment template: Excellent, Average, and Poor. Ratings provide a metric other than a numeric score to qualify the outcome of an assessment. Ratings are created at the beginning of the assessment template creation process. They are later applied to possible responses to questions in the template, which associates each rating with a score. Ratings display an appropriate feedback based on the completed assessment score once you submit an assessment. When setting up ratings and applying them to possible responses, remember that ratings and their associated feedback text will eventually display as part of the overall assessed health of a business object.

**Questions, Question Groups, and Question Weights**

Questions are the main components of an assessment template. They are written to help in systematically determining the health of a business object, and they are grouped into logical collections called Question Groups. Each question in the template is assigned a question weight. Question weight is expressed as a percentage, which is the relative importance of
the question within the template. When you use an assessment template to perform an assessment, a question's weight is multiplied by the normalized response score given for the question to produce a weighted score for that question.

When setting up questions, question groups, and question weights, you must carefully analyze which factors determine the health of a particular business object (like a lead or an opportunity) in your organization. Use those factors to create your question groups; and then write three to five questions per group that are weighted according to your analysis. There is no limit to the number of questions that can be in a question group, but each question group must have at least one question.

Responses and Scores

Responses are attached to questions in the template. Each question should have at least two responses, unless it's a free-form only question. More than one response can be tied to the same rating. However, between all of its responses, each question should accommodate at least two ratings, unless it’s a free-form only question. For example, if your ratings are Excellent, Average, or Poor, for each question you can include two responses that correspond to at least one of those ratings, such as average. There must be enough responses to cover at least two of the ratings, such as Excellent and Average. You assign a score to each response for a question, and the application normalizes the score based on a standard scoring scale.

When an assessment template is used to perform an assessment, a question’s weight is multiplied by the normalized score of the response given for the question to produce a weighted score for that response. When adding responses to questions, ensure that the scores and ratings you assign to each response correlate. In other words, the higher the score you assign to the response, the higher the rating should be so that you have a strong quantitative relationship between the two. Also note that you can allow free-form responses for one or more questions in the template, but free-form responses are never scored.

Associated Task Templates

A task template is an instruction to generate a group of related activities. You can associate task templates with an assessment template to recommend tasks that should be performed after an assessment has been done for a business object. When you associate task templates with an assessment template, you can indicate a score range for each task template. Based on the total score of any assessment that uses your template, one or more task templates will be recommended as follow-up activities. For a task template to be available to associate with an assessment template, it must be assigned to the same business object type as that assigned to the assessment template, and it must have a subtype of Assessment. Ensure that you have set up task templates correctly before associating them to assessment templates.

What happens if I include a free-form response for a question?

A score of 0 is assigned for free-form responses.

A free-form response option will have no effect on the overall assessment score. The free-form response offers the opportunity to enter a textual response to a question that does not conform to any of the prepopulated responses provided by the assessment template.

What's a question group?

A question group is a logical grouping of questions within an assessment template, and is strictly used as a category header for those questions. By naming the question group carefully, you can provide the template user an idea of the type of questions to expect in each group.
Assessment Template Status Codes: Explained

This topic explains the status codes for an assessment template. Throughout the life of an assessment template, you can assign different status codes. These status codes control the actions you are allowed to make against an assessment template.

- In Progress
- Active
- Retired

In Progress
This is the initial status of an assessment template. In this status, you can edit any part of the template. This is the only status in which you can delete a template. If the template is not deleted, it moves to the Active status.

Active
This is the status assigned when the assessment template has been deployed for general usage. In this status, you can make only minor textual edits to it, including, but not limited to, template description, question text correction, question sequencing change, response description, and score range feedback. From this status, you can move the template to Retired, but you cannot delete it.

Retired
When an assessment template is in this status, it is no longer available for general usage. You cannot edit any part of it, and you cannot move it to any other status. However, it can still be copied. Active templates that are deleted revert to this status.

Assessment Template Score Range: How It's Calculated

The application calculates the score range for an assessment template using the question weights and the ratings and scores assigned to the possible responses for all the questions in the template. This topic explains when the score range is calculated and the components that are used in the calculation, so that you can make the best decision regarding the feedback text to apply to each score range. In addition to the automatic score range calculation, you can manually adjust the score range by using the administration functionality.

Settings That Affect Score Range
In order for the application to calculate the assessment template score range, you must:

- Apply weights to all template questions.
- Configure ratings and apply them to possible responses for all template questions.
- Apply a score to each of the possible responses for all template questions.

How Score Range Is Calculated
The score ranges for each rating in an assessment template are determined using the lowest and the highest weighted response scores for each question. So for each rating score range, the lower end of the range starts where the previous rating range ended, and the higher end of the range is the sum of the highest weighted scores that can be attained for that rating.
The following table displays a simple example of the components used in the score range calculation.

<table>
<thead>
<tr>
<th>Question (Weight)</th>
<th>Response (Normalized Score)</th>
<th>Weighted Score</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the customer win? (20%)</td>
<td>Lower Operating Cost (100)</td>
<td>20</td>
<td>Excellent</td>
</tr>
<tr>
<td>What is the customer win? (20%)</td>
<td>Higher Revenues (80)</td>
<td>16</td>
<td>Average</td>
</tr>
<tr>
<td>What is the customer win? (20%)</td>
<td>Other (53)</td>
<td>11</td>
<td>Average</td>
</tr>
<tr>
<td>What is the customer win? (20%)</td>
<td>Don’t Know (27)</td>
<td>5</td>
<td>Poor</td>
</tr>
<tr>
<td>What is our win? (80%)</td>
<td>Reference (60)</td>
<td>48</td>
<td>Average</td>
</tr>
<tr>
<td>What is our win? (80%)</td>
<td>Resale (50)</td>
<td>40</td>
<td>Poor</td>
</tr>
<tr>
<td>What is our win? (80%)</td>
<td>Partnership (100)</td>
<td>80</td>
<td>Excellent</td>
</tr>
</tbody>
</table>

The following table displays the score range calculation based on the components from the previous table.

<table>
<thead>
<tr>
<th>Rating</th>
<th>Score Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellent</td>
<td>65 - 100</td>
</tr>
<tr>
<td>Average</td>
<td>46 - 64</td>
</tr>
<tr>
<td>Poor</td>
<td>0 - 45</td>
</tr>
</tbody>
</table>

If a template administrator does not use a particular rating while assigning ratings to possible responses, this could result in improper score range calculations. To counteract this problem, the score range calculation uses a built-in correction algorithm to ensure proper score ranges. The correction algorithm works like this: For a question where a particular rating is skipped, the low score for the skipped rating is calculated to be equal to the high score of the next lower ranked rating. The high score for the skipped rating is calculated to be equal to the low score of the next higher ranked rating.

Using the ratings displayed in the tables in this topic, if the rating Average is not used for a question’s possible responses, the score range calculation assigns a low score to Average for that question that is equal to the high score of Poor for that question. It also assigns a high score to Average for that question that is equal to the low score of Excellent for that question. This ensures that the overall template score range for Average is calculated to fall between the score ranges for Poor and Excellent.

Opportunity Assessments
Setting Up Opportunity Assessments: Points to Consider

When setting up and maintaining opportunity assessment templates, consider the implementation points described in this topic.

You can find a procedure describing how to set up assessment templates in the Creating Assessment Templates: Procedure topic.

**Setup Task for Opportunity Assessments**

In the Setup and Maintenance work area, the setup task for implementing opportunity assessments is Manage Opportunity Assessment Templates.

**Assessments Added to Sales Stages**

Assessments are available to sales users only after you create an assessment template and then add the assessment template to a sales stage within an opportunity sales method.

**Mandatory and Recommended Assessments**

When adding an assessment to a sales stage, you can mark the assessment as mandatory to be completed for the sales stage. In this case, the user must complete the assessment before moving the opportunity to the next sales stage. If you mark a template as recommended for a sales stage, the user is not required to complete the assessment before moving to the next sales stage.

**Opportunity Access Levels for Assessments**

The actions that end users can perform with opportunity assessments depend on the users’ access levels on an opportunity. The following table shows the access levels and actions.

<table>
<thead>
<tr>
<th>Access Level</th>
<th>Allowable Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Only</td>
<td>• View assessments in read-only mode</td>
</tr>
<tr>
<td></td>
<td>• Cannot add assessments</td>
</tr>
<tr>
<td>Edit or Full</td>
<td>• Add assessments</td>
</tr>
<tr>
<td></td>
<td>• Edit assessments</td>
</tr>
<tr>
<td></td>
<td>• Delete assessments (if enabled)</td>
</tr>
</tbody>
</table>

**Allowing Users to Delete Assessments**

You may want to enable the Delete Assessment button in the Assessments page so that sales representatives can remove an assessment and start over or remove an assessment that’s no longer required.

You use Page Composer to add the Delete Assessment button. See the Extending Sales guide for procedures.

**Enable Multiple Assessments Per Template**

To enable sales representatives to perform multiple assessments per assessment template, you must set the profile option, Enable Multiple Assessments Per Assessment Template, to Yes.
Enabling Multiple Opportunity Assessments Per Template

From time to time, sales representatives want to re-assess opportunity information and perform several assessments for opportunities using the same assessment template. To enable sales representatives to perform multiple assessments per assessment template, you must set the profile option, Enable Multiple Assessments Per Assessment Template.

Setting the Profile Option

Multiple assessments per assessment template is not enabled by default. To enable the functionality, set the profile option Enable Multiple Assessments Per Assessment Template (MOW_MULTIPLE_ASSESSMENTS_ENABLED) to Yes at the site level. Use the following procedure.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values

2. In the search region of the Manage Administrator Profile Values page, enter the profile option display name Enable Multiple Assessments Per Assessment Template in the Profile Display Name field.

3. In the search results list, click on the profile option name.

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

5. Click Save and Close.

Related Topics

- Performing Multiple Opportunity Assessments Using the Same Template
- Accessing Tasks to Update Existing Setup Data: Procedure

Lead Assessments

Lead Assessments: Explained

This topic outlines how lead assessment templates enable a uniform assessment implementation across leads for your organization. Assessment templates provide guidance to sales resources to move the leads further along the sales cycle. Using the lead assessment feature, you can:

- Define Lead Assessments Templates
- Associate Task Templates to Assessment Templates
- Assess Leads

Define Lead Assessments Templates

You can define assessment templates to include assessment questions that represent industry best practices, sales methodologies, or a combination of both. As you enter the different responses to the questions, an assessment progress bar provides immediate rating and feedback based on the assessment definition. You can also use assessment templates
to standardize lead follow-up procedures. Lead assessment templates enable consistent and predictable assessment for all leads for your business unit.

**Associate Task Templates to Assessment Templates**

An additional component to the assessment is the ability to recommend additional tasks based on the assessment results. If task templates are associated to the assessment, a list of recommended task templates is presented to you based on the assessment’s overall score. If applied, the tasks are added to the lead to support collaborative lead follow-up activities.

**Assess Leads**

Lead assessment is typically done as part of a lead follow-up activity where the lead continues to be progressed after the lead is qualified. The Lead Assessment Enabled profile option must be set by your administrator to display the Assessments tab in the Edit Lead user interface. If enabled, you can view the sets of predefined questions and answers collected to assist in evaluating the lead and perform the following actions from the lead’s Assessment tab:

- Perform New Assessments
- Edit Assessments
- Remove Incomplete Assessments
- Reassess
- View Historical Performance

**Related Topics**

- What’s the difference between lead qualification and lead assessment

**Enabling Multiple Assessments Per Lead Qualification Template**

From time to time, sales representatives want to requalify sales lead information and perform several qualifications for leads using the same qualification template. To enable sales representatives to perform multiple assessments per qualification template, you set the profile option Enable Multiple Assessments Per Qualification Template to Yes.

**Setting the Profile Option**

Multiple assessments per qualification template is not enabled by default. To enable the functionality, set the profile Enable Multiple Assessments Per Qualification Template (MOW_MULTIPLE_QUALIFICATIONS_ENABLED) to Yes at site level. Use the following procedure.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values
2. In the search region of the Manage Administrator Profile Values page, enter the profile option display name Enable Multiple Assessments Per Qualification Template in the Profile Display Name field.
3. In the search results list, click on the profile option name.
4. In the Profile Values section, select Yes from the Profile Value list.
5. Click Save and Close.

**Related Topics**

- Performing Multiple Lead Qualifications Using the Same Template
Setting Up Score and Rank for Leads: Explained

Sales representatives need to score and rank leads so that the lead score determines the rank assigned to the lead. The sales administrator can set up ranking rules based on the score.

Defining the Scoring and Ranking Rules

You can define the scoring and ranking rules that you want sales representatives to use in the lead management application. For example, you want to define the score ranges and corresponding rank and color values as shown in the following table:

<table>
<thead>
<tr>
<th>Score</th>
<th>Rank Name</th>
<th>Color</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-30</td>
<td>Cold</td>
<td>Blue</td>
</tr>
<tr>
<td>31-60</td>
<td>Warm</td>
<td>Yellow</td>
</tr>
<tr>
<td>61-100</td>
<td>Hot</td>
<td>Red</td>
</tr>
</tbody>
</table>

This example shows that when the sales representative enters a score value of 50 when creating or editing a lead, the rank will automatically be populated with the value of Warm, and the corresponding yellow color is displayed in the UI. The same color for the score is used when the lead is viewed in a list.

Setting Up the Scoring and Ranking Rules

The following table lists the default values for score and rank that is provided for you.

<table>
<thead>
<tr>
<th>Minimum Score</th>
<th>Maximum Score</th>
<th>Rank Name</th>
<th>Color</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>30</td>
<td>Cold</td>
<td>Green</td>
</tr>
<tr>
<td>31</td>
<td>60</td>
<td>Warm</td>
<td>Yellow</td>
</tr>
<tr>
<td>61</td>
<td>100</td>
<td>Hot</td>
<td>Red</td>
</tr>
</tbody>
</table>

The minimum score and maximum score are numeric text fields and are required fields. The rank name is determined from the list of values that can be modified from the Rank lookup type MKL_LEAD_RANK_SETID. You can choose a color from your standard UI color widget.
23 Setting Up Task Templates

Task Templates: Explained

By creating task templates, you can present groups of tasks for salespeople working sales deals. For example, you can create an opportunity task template that displays a set of tasks that need to be performed while working an opportunity. The tasks generated from the templates are accessible to salespeople in the Activities tab within the applicable sales business object work area.

You can create task templates for the following sales business objects:

- Opportunity
- Lead
- Campaign
- Customer

Task templates have such attributes as name, status, type and subtype. Task templates can be striped by business unit in a multiple-business-unit implementation, allowing you to have templates available only to a single set of users.

Related Topics
- Creating Tasks from a Task Template: Procedure

Initial Tasks for Task Templates

Creating a Task Template: Procedure

When you create task templates, you first create a task template and then you create the individual tasks.

To get started, you must search for the appropriate task template setup task in the Setup and Maintenance work area. The following table lists the task template tasks for the supported business objects.

<table>
<thead>
<tr>
<th>Business Object</th>
<th>Setup Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity</td>
<td>Manage Sales Task Templates</td>
</tr>
<tr>
<td>Lead</td>
<td>Manage Sales Lead Task Template</td>
</tr>
<tr>
<td>Campaign</td>
<td>Manage Marketing Campaign Task Template</td>
</tr>
<tr>
<td>Customer</td>
<td>Manage Customer Center Task Template</td>
</tr>
</tbody>
</table>

Use the following procedure to create a task template.
Note: In this procedure, the opportunity business object is used as an example. However, the procedure to create task templates is the same for all objects.

1. Sign in as the sales administrator or as a setup user.
2. In the Setup and Maintenance area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Sales Task Templates
3. In the Task Template section on the Manage Sales Task Templates page, click the Add icon.
   The Create Template dialog box appears.
4. Enter the following in the Create Template dialog box:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Template Name</td>
<td>Enter the name of the template.</td>
<td>Sales Coach</td>
</tr>
<tr>
<td>Description Template Set</td>
<td>Enter a brief description about the template name, if required.</td>
<td></td>
</tr>
<tr>
<td>Active</td>
<td>Indicates that the template is active. The check box is selected by default.</td>
<td></td>
</tr>
<tr>
<td>Template Type</td>
<td>The business object to which the task template is associated is set as default.</td>
<td>Opportunity</td>
</tr>
<tr>
<td>Subtype</td>
<td>The default value is blank. If you want to create a task template for assessment you must select Assessment. Otherwise, leave the field blank.</td>
<td></td>
</tr>
<tr>
<td>Template Set</td>
<td>Select the template set (Set ID) that you want to associate with your business unit.</td>
<td>Common Set</td>
</tr>
</tbody>
</table>

5. Click OK.
   The task template is created.
6. To create tasks for the task template, click the Create icon in the Details section.
   The Create Task dialog appears.
7. Enter the following in the Create Task dialog box:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>Enter the subject of the task.</td>
<td>Check Service Requests</td>
</tr>
<tr>
<td>Description</td>
<td>(Optional) Describe the task.</td>
<td></td>
</tr>
</tbody>
</table>
### Field | Description | Example
--- | --- | ---
Lead Time | (Optional) Enter the lead time for the task. | If you enter a lead time the task will begin after those many days. If a task is created from the task template on January 10, and the lead time value is 2, then the task start date is January 12.

#### Type | (Optional) Select a type for the task. | Call, Chat, Demo, E-Mail, Meeting

#### Template Duration | (Optional) Define the due date for the task. The due date is calculated based on the template duration value and the task start date. | If a task start date is January 12 and the template duration is set to 3, then the task due date is January 15.

#### Priority | (Optional) Select a priority for the task. | High, Medium, Low.

8. Click **OK**.

The task is created for that task template.

*Note:* After you create task templates, there may be additional steps needed for the tasks to display for end users. For example, with opportunities, you associate the task template with sales stages (see the topics for opportunity sales stages and sales methods setup for more information).

### Implementation Concepts for Task Templates

#### Defining Tasks: Points to Consider

A task is a unit of work to be completed by one or more people by a specific completion date. When using tasks in your application, you should consider the following points:

- Tasks
- Task Templates

##### Tasks

You define a task with a description, due date, and category. Each task has an owner, who oversees or is responsible for the task, and one or more assignees who perform the work.

The task can be related to a business object, such as an opportunity, a customer, or one or more external contacts. Tasks can also have notes for general information and attachments for tracking e-mail or project documents.

##### Task Templates

Often, a process includes a set of tasks that are performed repeatedly. To make this easier, administrators can define task templates, which represent a group of tasks. You can use a task template when working on a particular business object. You
select the appropriate task template for your process and the application creates the tasks and associates them with the business object being worked on.

Note: You can modify the task object using Application Composer. For more information, see the Extending Sales guide.

Related Topics
- Creating Tasks from a Task Template: Procedure

What are the statuses a task can be in?

Tasks can have the following statuses by default. You can change or delete these statuses, or add more to fit your needs. The following table shows task statuses and their meanings.

<table>
<thead>
<tr>
<th>Status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canceled</td>
<td>The task was canceled.</td>
</tr>
<tr>
<td>Complete</td>
<td>The task was completed. You can change this status to another one as needed.</td>
</tr>
<tr>
<td>In progress</td>
<td>The task is currently active and being worked on.</td>
</tr>
<tr>
<td>Not started</td>
<td>The task has not yet been started.</td>
</tr>
<tr>
<td>On hold</td>
<td>The task is not actively being worked on, but has not yet been completed.</td>
</tr>
</tbody>
</table>

If a task is set to Complete, the Percentage Complete field for the task is set to 100 percent, and the end date is set to the current date.

Note: If you change the status of a Complete task to something else, the Percentage Complete field value does not change automatically.

Assessments Integration

Assessment Templates and Task Templates: How They Fit Together

One of the steps for creating an assessment template is associating task templates. You would take this step if you want to recommend sets of tasks to be done after an assessment is performed using your template. You associate task templates to
ranges of scores in the assessment template, and where the overall assessment score falls within those ranges determines the tasks that are suggested to be performed after the assessment.

Assessment Template

An assessment template is a set of weighted questions and possible responses used to evaluate the health of a business object such as an opportunity or a lead. An assessment template can be associated with one or more task templates that are recommended based on the outcome of an assessment.

Task Template

A task template is an instruction to generate a group of related activities. By marking a task template with a subtype of Assessment, you make that task template available for association with assessment templates. The task template’s business object type should be the same as that assigned to the assessment template. When an assessment is performed using an assessment template that has associated task templates, one or more task templates are recommended based on the total score of that assessment and can be used to generate a list of activities to perform.

For example, you can associate a task template called Engage Business Development Manager with your assessment template called Potential for Win-Win. Associate the task template with the score range of 86 to 100, so if an assessment using the assessment template Potential for Win-Win scores within that range, the application recommends the Engage Business Development Manager task template and a list of follow-up activities based on that template can be generated.

Related Topics

• Turning a Business Process into a Task Template: Example
Associating Task Templates with Assessment Templates: Procedure

Associate task templates with assessment templates to recommend tasks to salespersons based on the assessment outcome. When a task template is associated with an assessment template, a set of related tasks appears as follow-up activities after a salesperson completes the assessment for an object.

Task templates are preconfigured, individual tasks that you can group together and associate with an object. Template tasks are a set or group of individual tasks from the task template. An administrator can only create a task template for the following objects:

- Opportunity
- Lead
- Campaign
- Customer

**Note:** To be available for selection, the task template must have a subtype of Assessment and belong to the same object as the assessment template. For example, when creating an assessment for an opportunity, you must select an opportunity task template.

To associate task templates:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Opportunity Assessment Templates
2. In the Manage Opportunity Assessment Templates page, click **Create**.
   **Note:** The last task is to associate task templates.
3. Navigate to the Associate Task Templates page.
4. Click the **Create** icon.
5. Select the task template that you want to associate with the assessment template.
6. Click **OK**.
   The selected task template appears in the Associate Task Templates page.
   **Note:** If you enter a score range, you can view the task template only when the assessment is within that score range.
7. Click **Save**.
   The task template is associated with the assessment template.

**Related Topics**

- Setting Up Assessment Templates: Points to Consider
- Assessment Template Components: How They Fit Together
How can I create a task template that is available to associate with assessment templates?

Create the task template with a subtype of Assessment.
## Setting Up Forecasting

### Sales Forecasting Features: Overview

Forecasting future sales is a method of providing predictions of future revenue for specific time periods. Management uses sales forecast data to set production schedules and volumes, to determine resource requirements, and to report financial guidance to investors.

The following table lists forecasting features:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Details</th>
</tr>
</thead>
</table>
| Submit forecasts                  | Salespeople can view, manage, and submit their forecasts in the office and using the mobile application. Specifically, salespeople can:  
  • Review their forecasted product items and submit the forecast.  
  • View their unforecasted pipeline.  
  • Use embedded analytics to improve forecast accuracy. |
| View automatically generated forecasts | The forecast for a period is automatically generated from eligible opportunity product items scheduled to close within the period. Forecasts are refreshed from the pipeline revenue in real time. Opportunities and forecast items continue to synchronize until the salesperson submits forecast items for final approval.  
The sales administrator sets the criteria that determine whether a product item is eligible to be automatically included in a forecast. The administrator also provides the option for salespeople to override the established criteria and manually include or exclude a product item from the forecast.  
Forecasting reflects any edits made to an opportunity, or any adjustments made at the deal level in real time. |
| Forecast by territory             | You forecast sales by territory. The forecasts roll up following the territory hierarchy. Changes to the active territory hierarchy are periodically synchronized with the forecast hierarchy up until a freeze date. After the territory freeze date, salespeople can make changes to their forecasts. |
| Compare forecasts                 | You can view current, future, and past forecasts. The current forecast is open for editing at certain times and then frozen. Sales managers can view the latest forecasting data and compare it to key metrics such as pipeline and won revenue. |
| Adjust forecasts                  | Sales managers can review and adjust their forecasts wherever they are.                                                                                                                                 |
| Manage subordinates’ forecasts    | Sales managers can quickly see which salespeople have submitted their forecasts, what has changed since the previous forecast, and the opportunities that comprise the forecast. Sales managers can also drill into their subordinates’ forecasts to view a forecast the same way that the salesperson sees it. This provides sales managers with the opportunity for more effective coaching and greater forecast accuracy.  
Sales managers can add, remove, or adjust individual lines in a salesperson’s forecast, segment the totals by time period, and override forecast totals for each salesperson. Any adjustments are clearly identified throughout the forecast hierarchy, allowing management to quickly view the changes made by sales managers on their team. |
Record overlay forecasts
You can record overlay forecasts on opportunity revenue transactions in addition to the revenue sales credit split. Overlay forecasts allow nonprimary salespeople to forecast sales expectations for all overlay sales credits.

Forecast by product
If enabled, you can forecast by product, forecasting amount, and quantity.

Initial Tasks for Forecasting

Implementing Forecasting: Overview
Salespeople forecast sales by territory as well as by individual salesperson or other resources. The application generates forecasts from opportunities according to configured options. Revenue for opportunities with close dates that fall within a forecast time period is added into the forecast for that time period for the related territory and salespeople for that opportunity.

The implementation includes:

1. Configure territories.
2. Configure opportunities.
3. Enable forecasting.

The application generates your forecast submission windows and sets default forecasting options. It also schedules the required forecasting background processes.
4. Change forecasting options and submission window dates, if needed.

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.
### Forecasting Options

The following options were set when you enabled forecasting:

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.

Generating Forecast Submission Windows and Setting Forecasting Options

After you enable forecasting, you can make changes to match your business practices by setting the different options on the Select Forecasting Options page. You can specify how far in advance and how frequently you forecast and generate the forecasting submission windows during which your sales organization can adjust forecasts. You can also change the criteria the application uses to determine which opportunities to include in a forecast and you can permit adjustments by product or by territory.

Select Forecasting Options Page Overview

The following table highlights the different regions on the Select Forecasting Options page shown in the figure and provides an overview of the entries described in detail in the sections that follow.

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>Region Name</th>
<th>Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Forecast Period Parameters</td>
<td>Enter the parameters that the application uses to generate the dates for each forecast and the forecast submission windows.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>During each window, your sales organization can update the forecast for the current period. Usually this window starts right after the last forecasting call with sales management and ends just before the next one.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>At the end of each window, the application takes a snapshot of your organization’s forecasts so the forecasts are ready for your call.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The generated submission windows are displayed in the Scheduled Forecasts region where you can adjust them to conform with your actual forecasting schedule.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The automatically generated submission windows are approximations only, so you must adjust the dates manually.</td>
</tr>
<tr>
<td>2</td>
<td>Unadjusted Forecast Criteria</td>
<td>Specify the criteria the application uses to determine which opportunities to include in the forecast.</td>
</tr>
<tr>
<td>3</td>
<td>Product Tab</td>
<td>Enable Product Totals was selected for you to enable the Products tab. Sales managers use the tab to adjust forecasts by product group rather than by territories. Deselect Enable Product Totals to enable adjustments by territories.</td>
</tr>
<tr>
<td>Callout Number</td>
<td>Region Name</td>
<td>Overview</td>
</tr>
<tr>
<td>---------------</td>
<td>---------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>4</td>
<td>Metrics</td>
<td>This region is used for setting options for specifying what metrics show up in legacy desktop UIs. These UIs are not available to new customers. New customers must use Application Composer to modify forecasting UIs. The metrics selected for you are pipeline and closed revenue.</td>
</tr>
<tr>
<td>5</td>
<td>Additional Settings</td>
<td>Use this region to enable the forecast trend graph and adjustment notes.</td>
</tr>
<tr>
<td>6</td>
<td>Scheduled Forecasts</td>
<td>The application displays the generated forecast submission windows in this region. You must manually adjust the dates of each submission window as needed.</td>
</tr>
</tbody>
</table>
The following figure shows the UIs described in the preceding table.
Unadjusted Forecast Criteria

- Enable nonrevenue forecasting
- Enable Forecast Criteria Override

Probability greater than 75

Product Tab

- Enable Product Totals
- Product Hierarchy Depth 1

Metrics

- Pipeline
- Closed Revenue
- Quota
- Expected Forecast
- Best Case
- Worst Case

Additional Settings

- Enable Forecast Trend Graph
- Enable Adjustment Notes
Creating the Forecast Submission Windows

You generate the forecast submission windows on your calendar by entering parameters in the Forecast Period Parameters region. Each submission window controls application action. The following figure shows submission windows at the beginning of each month. Each submission window:

- Starts on a Territory Freeze Date (indicated by callout 1 in the figure)
- Ends on the forecast Due Date (callout 2)

Before each freeze date:

- The forecast is read only.
- Changes to the territory and product hierarchy are synchronized to the forecast.
- Changes to revenue items are synchronized to forecast items.
After each freeze date:

- Sales users can edit, adjust and submit forecasts.
- Changes to revenue items are synchronized to forecast items.
- Salespeople must adjust and submit their forecast between the Territory Freeze Date and the Due Date.

The following figure shows the submissions windows for January, February, and March.

After salespeople submit their forecasts, they cannot edit them, but the forecasts can be adjusted by managers. After the due date is reached, each forecast becomes read-only.

To generate the forecast submission windows:

1. In the Forecast Period Parameters region, enter the options that the application uses to generate forecasts and the approximate forecast submission windows.
The following figure shows the Forecast Period Parameters region on the Select Forecasting Options page.

### Forecast Period Parameters

- **Enable Forecasting**
- **E-Mail Address**: abcd@oracle.com
- **Forecast Period**: Quarter
- **Adjustment Period**: Fiscal period
- **Forecast Frequency**: 3
- **First Forecast Due Date**: 31 Days
- **Territory Freeze Date**: 31 Days Before the Forecast Due Date
- **Number of Concurrent Forecasts**: 1
- **Number of Scheduled Periods**: 4

The following table describes the options and provided values for submitting monthly forecasts for the current quarter.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
<th>Provided and Suggested Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forecast Period</td>
<td>Typically a quarter. Each forecast includes only those opportunities set to close in the forecast period.</td>
<td><strong>Quarter</strong></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>Enter the number of submission windows you want to generate for each forecast period.</td>
<td>Because you are holding a forecasting call each month and there are three months in each quarter, the value is 3.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
<td>Provided and Suggested Values</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------</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 in the <strong>First Forecast Due Date</strong> field and the <strong>After the forecast period start date</strong> option selected.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The application generates the subsequent submission windows based on the number of days you enter here and in the <strong>Territory Freeze Date</strong> field, but because each calendar month has a different length, entering 31 generates submission windows with some overlap.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>During overlapping submission windows salespeople and their managers see two forecast submission windows, but you can choose to ignore these overlaps or adjust the dates after you generate the scheduled forecasts.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Forecasting periods can overlap and can have gaps, but any gaps result in periods where users cannot submit or edit their forecasts.</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. You can limit the number of concurrent forecasts and the generated periods</td>
<td>After you enable Forecasting the value is 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 will be set to the due date of the next scheduled forecast.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If you enter 2, then the scheduled forecasts are generated so that both the current period and the next period are frozen at the same time, and there will be no gaps in between forecasts freeze dates and due dates. The freeze date of the first forecast will be set to the due date of the next scheduled forecast.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If the value is left blank, then the generated forecast dates can have gaps or overlaps.</td>
</tr>
</tbody>
</table>
2. If you modified forecast period options, then click **Submit**.

3. The Forecast Autopilot process runs at the next scheduled time. It reschedules the other processes. The processes regenerate your forecasts. The Select Forecasting Options page is unavailable until the processes completes. When the process completes, the generated submission windows appear in the Scheduled Forecasts region. The windows will look similar to what’s included in the following table:

   - **The Forecast Name**
     The system-generated name for each submission window.
   - **Start Date**
     The start date of the forecasting period, the beginning of the quarter.
   - **End Date**
     The end date for the forecasting period, the end of the quarter.
   - **Territory Freeze Date**
     The start date for the forecast submission window.
   - **Due Date**
     The end date for the forecast submission window, the period when the sales organization can adjust forecasts. At the end of this date the application takes a snapshot of the forecast and opens a new window.

     The forecast is frozen on the due date regardless if users click the submit button. After the due date passes, the active forecast is marked as past, and the next forecast is marked as active.

4. Click the **Select Forecasting Options** task link again.

   The Select Forecasting Options page shows the status of the period generation process. The status does not refresh automatically, so you may have to click **Cancel** to return to the Setup and Maintenance work area and try again later.

### Forecast Name | Start Date | End Date | Territory Freeze Date | Due Date |
--- | --- | --- | --- | --- |
Q3-2017 - 2017/08/01 | 7/1/2017 | 9/30/2017 | 7/1/2017 | 8/1/2017 |
Q3-2017 - 2017/08/31 | 7/1/2017 | 9/30/2017 | 8/1/2017 | 9/1/2017 |
Q3-2017 - 2017/08/31 | 7/1/2017 | 9/30/2017 | 9/1/2017 | 9/30/2017 |
Q4-2017 - 2017/11/01 | 10/1/2017 | 12/31/2017 | 10/1/2017 | 10/31/2017 |
Q4-2017 - 2017/12/01 | 11/1/2017 | 12/31/2017 | 11/1/2017 | 12/1/2017 |
Setting Forecasting Criteria

Opportunity items that match the forecasting criteria are added to the forecast according to their scheduled close dates. To set forecasting criteria:

1. In the Unadjusted Forecast Criteria region of the Forecast Options page, the provided criteria is win probability greater than or equal to 70 percent. You may want to specify the probability that matches the default probability of the appropriate sales stage in your sales method. You can add or use other criteria.

   Note: By default, the win probability and close date are set at the opportunity level. To forecast at the level of individual revenue lines, expose the win probabilities for the lines in the Edit Opportunity page using Application Composer.

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. If you select the option, then salespeople can make a selection from the Include in Forecast list while editing an opportunity.

   If you do not want users to use this list, then you must hide this field on the opportunity UI by using Application Composer. Leaving the **Enable Forecast Criteria Override** option deselected, does not by itself prevent users from making a selection from the list.

   Note: Even when you disable the **Include in Forecast** list, users can always edit an opportunity to exclude it from the forecast, for example, by entering a different win probability.

3. Select the **Enable nonrevenue forecasting** option if you want to generate separate forecasts for overlay territories.

Enabling Forecast Adjustments by Product

To enable forecast adjustments by product:

1. 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. See callout 1 in the figure at the beginning of this topic.
2. The number of sales catalog levels you can edit in the Products tab is set to 2 in the Product Hierarchy Depth field. To improve usability, Oracle recommends setting the depth to 1 unless there is a compelling business need to break the forecast out beyond the first level of the product group hierarchy.

Enabling Adjustment Notes and the Forecast Trend Graph

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. If you enable the Quota metric, then the landing page displays a quota vs. forecast chart instead of the forecast by period. Your third option is the forecast trend graph to be the second chart. If enabled, sales managers can add notes about their adjustments when they adjust forecasts. These are not enabled for you. To enable adjustment notes and the forecast trend graph:

1. Select **Enable Forecast Trend Graph** to replace the period bar graph, or the quota chart if you use quotas, with the forecast trend graph.
   For the displayed territory, forecast period, and type of forecast, the graph shows the following:
   - Current and past forecast snapshots
   - Won revenue trend
   - Quota

2. Select **Enable Adjustment Notes** to enable notes for adjustments. Sales managers can then add adjustment notes for each forecast item. They can also create and edit a single adjustment note for summary territory adjustments or a note for summary product adjustments.

Implementing Unit Forecasting

You can forecast by territory and amount, by product and amount, and by product and quantity of units. This topic explains the steps to implement unit forecasting.

Opportunity items often include quantity, price, and either a calculated amount from quantity and price or an entered amount. The opportunity items are aggregated into forecasts by close date in the following ways:

- The amounts are totaled for the time period and territory.
- The amounts are totaled for the time period and by product.
- The quantities are totaled for the time period and by product.

By default, only the amount (quantity times price) is forecasted. To forecast the quantity, complete the following steps:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Forecasting
   - Task: Manage Forecast Metrics

2. In the Lookup Codes region, find the lookup code `ORA_QUANTITY` and check the Enabled box.

3. Save and close.

4. In Select Forecasting Options, the Summary Tab region, select **Enable Product Totals**.
   The Edit Forecast page will include the Products tab.

5. Select the number of sales catalog levels you want to edit in the Product tab in the **Product Hierarchy Depth** field. Oracle recommends setting the depth to 1.
Implementation Concepts for Forecasting

Sales Forecast Components: How They Work Together

A sales forecast for a territory encompasses a time period and sales opportunities that meet defined criteria. Salespeople submit their forecasts to their managers, who make any needed changes and in turn submit the forecasts to their managers.

The following figure shows the components for a territory forecast. Product items from opportunities form the original forecast. If the product item has multiple sales credits, then the product item is visible across multiple forecasts. Salespeople add adjustments to the forecast. Adjustments can be applied at a summary or item level.

<table>
<thead>
<tr>
<th>Original Forecast</th>
<th>Adjusted Forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forecast Territory</td>
<td>Forecast Period</td>
</tr>
<tr>
<td>Criteria</td>
<td>Original Forecast</td>
</tr>
<tr>
<td></td>
<td>Adjustment</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunity</th>
<th>Product Item</th>
<th>Product Item Credit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Territory</td>
<td>Close Date</td>
<td>Match</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Revenue Credit</td>
</tr>
<tr>
<td>Primary Territory</td>
<td>Close Date</td>
<td>Override</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Overlay Credit</td>
</tr>
</tbody>
</table>

Product Items

The forecast territory must be correctly assigned for the product item to appear in the correct forecast.

A product item from an opportunity must have a designated close date that falls within the forecast period to be included in the forecast.

The criteria for the product item must match the criteria set for the forecast. For example, if the forecast criteria specify a win probability of greater than 75 percent, then a product item with a win probability of 80 percent is added to the forecast.

If the ability to override is enabled, then a salesperson can include a product item in the forecast even though it does not match the criteria, or exclude a product item that matches the criteria.
It is possible for managers to pull in forecast items as adjustments that do not match the close date or criteria and override conditions.

**Original Forecast**

The original forecast is the total of all product items that match the forecast criteria or that are included by overrides. All product items must have close dates within the forecast period.

Salespeople can add a positive or negative adjustment on top of the original forecast to form an adjusted forecast.

Managers and overlay credit recipients can pull in forecast items as adjustments that do not match the close date or criteria and override conditions. Also, managers and overlay credit recipients can drop items as adjustments, regardless of close date or match and override conditions.

**Unadjusted Forecast Criteria: Explained**

The administrator sets the forecasting criteria. The forecasting criteria determines what product items are automatically included in the sales forecast. The product item amounts add up to become the unadjusted forecast amount.

The forecast includes items when:

- The item close date falls within the forecast period.
- The item is assigned to a forecasted territory.
- The item is closed as won.
- You set the override for the forecast item to always include it in the forecast.
- The item matches the forecast criteria. For example, include in the forecast all product items with a win probability greater than 70 percent.

The forecast excludes items when:

- Items are closed as lost.
- When you set the override to never include an item in the forecast.

**Logic**

The logic joins each set criterion with AND. If two criteria are for the same attribute and use equals, then they are joined by OR.

For example, the criteria:

- Status = Open
- Status = WIP
- Product <> CRM
- Product <> ERP
- Win Probability > 20
- Win Probability < 80

Translates logically to:

- (Status = Open OR Status = WIP) AND
- Product <> CRM AND
• Product <> ERP AND
• Win Probability > 20 AND
• Win Probability < 80

**Related Topics**

• Setting Opportunity Revenue Forecast Criteria

## Overlay Forecasting: Explained

Overlay resources who are not the owners of the primary territory can submit a forecast on the same revenue as the primary sales resource. The primary sales resource submits a prime forecast, and the amount should be counted only once for the prime forecast. The overlay resource submits an overlay forecast, counting the same revenue a second time.

If multiple overlay resources forecast the same deal, then the same revenue amount can be added to the overlay forecast many times. A primary resource for one territory can submit an overlay forecast for another territory, so the context of the territory determines if a user is submitting a prime or an overlay forecast.

Users can submit both prime and overlay forecasts. In this case, management often expects a certain ratio of prime to overlay amounts. Management can further analyze any major discrepancy from the ratio. The overlay forecast is taken from the nonrevenue credit split within opportunities, and is closely associated with the nonrevenue quota goals set on the territory.

The administrator must enable overlay forecasting using the Enable nonrevenue forecasting check box in the Select Forecasting Options page before salespeople can add to overlay forecasts.

### Territories

In the Enable Forecasting field, you can designate territories as disabled for forecasts, or as forecastable for prime, for overlay, or for both.

An owner of an overlay territory can’t access a prime forecast, and an owner of a prime territory can’t access an overlay forecast. However, when managing revenue, it’s possible to assign a revenue split to an overlay territory or a nonrevenue split to a prime territory.

## Territory Freeze Date: Explained

Salespeople can begin forecasting activities on the territory freeze date. The territory hierarchy used for forecasts freezes on this date. Forecast rollups from territories to parent territories follow the frozen hierarchy until the forecast due date.

The territory hierarchy freezes at 12:00 AM server time on the day of the territory freeze date. Therefore, if you set the territory freeze date to today it’s immediately effective.

The primary territory for an opportunity can change due to territory realignment. The forecast item reflects this and other changes made to the opportunity both before and after the territory freeze date, up until the forecast item is locked. When you adjust Forecast items they become individually locked. When you perform a summary level forecast adjustment or submit your forecast your entire forecast is locked.

Following are related aspects of the territory freeze date:

• Freeze date changes
• Forecast submissions
• Territory changes

Freeze Date Changes
If the forecast is frozen and the administrator extends the freeze date, then all submitted forecasts are unsubmitted and all the forecasts are no longer frozen.

Forecast Submissions
Salespeople can submit their forecasts only after the territory freeze date and before the forecast due date.

Territory Changes
Territory hierarchy changes aren’t reflected in the forecast hierarchy for frozen forecasts. Opportunity changes are not reflected in locked forecast items.

For forecast items that aren't locked, the following changes occur after the freeze date:

• When revenues move to newly added territories after the forecast is frozen, the forecast items don’t move to the new territories because the new territories aren’t added to the frozen forecast hierarchy.
• Forecast items are removed from deleted territories, provided both the source and destination territory forecasts are not submitted.
• When revenues move between territories, the forecast items do not move if either the source or destination territories are submitted.
• If revenues move between existing active territories due to territory definition changes, then forecast items also move.
• If revenues move between existing active territories due to revenue attribute changes, then forecast items also move.

Managing Forecasts for Others: Explained
A sales administrator has access to all forecasts. You can delegate someone on the territory team to take care of forecasting actions for that territory owner.

If, for example, a senior sales manager wants one person to update forecasts for everyone in her territory hierarchy, then for her territory she adds that person as a member of the territory team and selects the Forecast Delegate check box.

Finding and Viewing Forecasts
The administrator or delegate can search to find the territory forecast to be updated. You can search for past, current, and future forecasts. You can also save your favorite searches.

You can switch from card view to list view in the Forecasts page to make it easier to work with multiple forecasts. Use the icons next to the Export button.

Copying the Prior Forecast
Use the Copy Prior Forecast action to ignore the rolled up opportunity data and copy the numbers from the previously submitted forecast to the current forecast. The prior forecast included forecast items and adjustments, unless it in turn was copied. Your copy takes the total forecast numbers, including adjustments, and pastes them to your current forecast. These numbers overwrite any calculated totals from rolled up opportunity or adjustment data.
Forecasting: Available Metrics

Metrics provide calculated measures based on historical or current transactional data. Salespeople can refer to metrics when making forecasting decisions. Your administrator enables one or more metrics. Disabling a metric hides the metric from the user interface and speeds up the execution time for certain background processes.

The following table shows the available metrics and how they are calculated:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Best Case Forecast</td>
<td>The best case forecast metric is the sum of all best case revenue values for all forecast items in the forecast period. You can enter the best case revenue amount when you change the product line details in an opportunity.</td>
</tr>
<tr>
<td>Closed Revenue</td>
<td>The closed revenue metric is actual revenue for the target territory that was closed during the forecast period.</td>
</tr>
<tr>
<td>Estimated Adjustment</td>
<td>The estimated adjustment metric is the sum of the difference between estimated revenue and revenue for all transactions in the forecast period. Sales Predictor uses statistical analysis to provide the estimated revenue amounts based on historical sales for the product.</td>
</tr>
<tr>
<td>Expected Forecast</td>
<td>The expected forecast metric is the sum of all weighted revenue values for all forecast items in the forecast period. Weighted revenue is the revenue amount multiplied by the probability of the deal closing.</td>
</tr>
<tr>
<td>Likelihood to Buy Product</td>
<td>The likelihood to buy product metric reflects the percentage of confidence that a deal will close with the specified revenue on the specified close date. Sales prediction uses statistical analysis to provide the likelihood to buy product based on historical sales for the product.</td>
</tr>
<tr>
<td>Pipeline</td>
<td>The pipeline metric is the total revenue amount of all product lines where the Status category is Open, the primary territory is the target territory, and the close date lies in the forecast period. Unforecasted pipeline is the total revenue amount of all product lines without a corresponding forecast item, where the status category is Open, the primary territory is the target territory, and the close date lies in the forecast period.</td>
</tr>
<tr>
<td>Quota</td>
<td>The quota metric is the revenue target associated with the expected performance of a salesperson’s territory for a given forecast period.</td>
</tr>
<tr>
<td>Worst Case Forecast</td>
<td>The worst case forecast metric is the sum of all worst case revenue values for all forecast items in the forecast period. You can enter the worst case revenue amount when you change the product details in an opportunity.</td>
</tr>
</tbody>
</table>

Forecast Period Parameters: Examples

The sales administrator creates a forecast by setting and submitting period parameters and forecast criteria. The following example illustrates how the period parameter settings affect the forecasting dates.
Quarterly Forecast

Your company holds monthly board meetings on 11th of every month where they review, among other things, sales forecasts for the next quarter. In preparation for these board meetings, the sales vice-president asked you to generate a monthly forecast which predicts sales for the next quarter.

On January 1, you configure a recurring monthly forecast with a due date of the 10th of every month by setting the due date to 80 days (21 days of January +28 Days of February +31 days of March) before the first forecast period start date, which is April 1. The end date of the forecast period will be June 30. You set the following forecast period parameters for the monthly board meeting forecast:

- Forecast Period: Quarter
- Frequency: Three
- Adjustment Period: The Fiscal Period as set in the calendar. In this example it is monthly.
- Due Date: 80 days before the first forecast period start date
- Territory Freeze Date: 5 days before the forecast due date
- Number of Concurrent Forecasts: Not set

You will edit the individual due date and freeze date for one quarter where the calculated date doesn’t fall on the correct date.

The following table illustrates the forecast dates that result from these forecast period parameters:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Q2 January 10</th>
<th>Q2 February 10</th>
<th>Q2 March 10</th>
<th>Q3 April 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>January 10</td>
<td>February 10</td>
<td>March 10</td>
<td>April 10</td>
</tr>
<tr>
<td>Territory Freeze Date</td>
<td>January 5</td>
<td>February 5</td>
<td>March 5</td>
<td>April 5</td>
</tr>
<tr>
<td>Start Date - End Date</td>
<td>4/1 to 6/30</td>
<td>4/1 to 6/30</td>
<td>4/1 to 6/30</td>
<td>7/1 to 9/30</td>
</tr>
</tbody>
</table>

> Note: The number of scheduled periods determines how far in advance the forecast schedule will extend measured in terms of the forecast period. If a period is quarterly, and the number of scheduled periods is four, the application will generate forecasts up to one year in advance.

One Concurrent Forecast

You want one active forecast period at a time, with no overlapping dates or gaps. You set the following forecast period parameters:

- Forecast Period: Quarter
- Frequency: Three
- Adjustment Period: The Fiscal Period as set in the calendar. In this example it is monthly.
- Due Date: 31 days after the first forecast period start date
- Territory Freeze Date: 31 days before the forecast due date
- Number of Concurrent Forecasts: One

The following table illustrates the forecast dates that result from these forecast period parameters:
### Two Concurrent Forecasts

You want two active forecast periods at a time, with no overlapping dates or gaps. You set the following forecast period parameters:

- **Forecast Period:** Quarter
- **Frequency:** Three
- **Adjustment Period:** The Fiscal Period as set in the calendar. In this example it is monthly.
- **Due Date:** 60 days before the first forecast period start date
- **Territory Freeze Date:** 31 days before the forecast due date
- **Number of Concurrent Forecasts:** Two

The following table illustrates the forecast dates that result from these forecast period parameters:

<table>
<thead>
<tr>
<th>Forecast Name</th>
<th>Start Date</th>
<th>End Date</th>
<th>Territory Freeze Date</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q3-2018-2018/ 08/01</td>
<td>7/1/2018</td>
<td>9/30/2018</td>
<td>7/1/2018</td>
<td>7/31/2018</td>
</tr>
</tbody>
</table>
FAQs for Forecasting

What’s an adjustment period?
The time period for which a salesperson can enter a summary adjustment to the forecast or enter an adjusted forecast is the adjustment period. The field Period Frequency in Manage Accounting Calendars sets the time periods for viewing forecast amounts and making adjustments. The period frequency is named Fiscal period for the Adjustment Period field in the Select Forecasting Options page.

When do I realign territories?
As a best practice, perform major territory realignments when no forecasting activities are open. Forecasting takes place after the territory freeze date set for the forecast and up to the forecast due date. If all leaf territory forecasts are submitted but the due date has not been reached, it is safe to make changes to territories.

How can I display my own graphs in Forecasting?
Business Intelligence reports provide graphs that you can embed in Forecasting. Add your graph names as lookup meanings in the lookup type Forecast Graph Selector. For the third lookup value use the lookup code ZSF_GRAPH3 and so on. Add a new profile option for each graph that provides the path to the graph as the value, and give the profile option the same name as the lookup code for the respective lookup value. See the profile option ZSF_GRAPH1 Sales Forecasting Graph 1 for an example.

How can a salesperson adjust forecast items?
The administrator sets the profile option Enable Sales Representative Adjustments to yes. This option can’t be changed back to no in the future. A salesperson who owns a leaf-level revenue territory can then adjust forecast items. Also, a manager who drills down to a salesperson’s forecast can act as the salesperson and adjust the salesperson’s forecast items.

What’s a forecast criteria override?
If the override is enabled, then salespeople can manually include or exclude a revenue item or forecast item from the sales forecast. Items that fall within criteria set by the administrator (such as win probability greater than 70 percent) are automatically included in the forecast, unless the salesperson employs the override.

Forecasting Processes
Forecast Processes: Explained

When you enable forecasting, the Forecast Autopilot process is scheduled to run every hour. Forecast Autopilot schedules the required processes for forecasting and records when each process is run, along with the status. The following processes and scheduled times are generated by Forecast Autopilot:

- **Due Date Check**
  This short process archives forecasts that are now past their due dates and activates the next scheduled forecast. It runs once a day.
- **Refresh Forecast**
  This process updates current and future forecasts using the latest opportunity data. It also updates the forecast territory hierarchy from the latest active territories. Between the territory freeze date and the forecast due date, the forecast territory hierarchy remains frozen. This process runs one day before the territory freeze date for each forecast period.
- **Refresh Revenue Metrics**
  This process calculates the pipeline metric and closed revenue metric. This process refreshes the pipeline metrics visible to the manager. This process runs every hour.
- **Compress Forecast Metrics**
  This process reduces space usage and improves performance by compressing calculated metrics. This process runs every hour.

If you change the schedules for the processes, then the Forecast Autopilot runs as frequently as the process with the most frequent schedule. Do not run the Generate Forecast process. To run Forecast Autopilot right away:

1. Navigate to Scheduled Processes.
2. Click **Schedule New Process**.
3. Find **Forecast Autopilot**.
4. Click OK.
5. In the **Diagnostic Parameters** field, enter `setup_auto_pilot=ON`.

If you want to disable the Forecast Autopilot process, then enter `setup_auto_pilot=OFF`. With Forecast Autopilot disabled, you must schedule each process.

6. Click **Submit**.

What happens when I submit forecast options changes?

A change in forecast period parameters starts a process to regenerate all future scheduled forecasts, which deletes them and then recreates them. Forecast period parameters include forecast period, forecast frequency, first forecast due date, territory freeze date, number of concurrent forecasts, and number of scheduled periods.

A change in unadjusted forecast criteria starts a process to update future scheduled forecasts. A change to metrics, the summary tab selection, or scheduled forecasts doesn’t regenerate the future scheduled forecasts.

If the Forecasting Autopilot process is enabled, then it reevaluates the settings and reschedules the other processes. Forecasting Autopilot runs at the next scheduled time after you submit your changes. If you want to run it before that, you can run a standalone Forecasting Autopilot process using the parameter `setup_auto_pilot=ON`.
Forecast Synchronization: Explained

When a salesperson updates a product item in an opportunity, the unsubmitted, unadjusted forecast is automatically updated to reflect the change.

The updates include the following:

- Creating new forecast items for opportunities that meet forecast criteria
- Updating existing forecast items
- Removing forecast items that no longer meet forecast criteria

Periodic Synchronization

The periodic process Refresh Forecast updates the forecast hierarchy from the territory hierarchy for unfrozen forecasts nightly or as scheduled. When a salesperson’s forecast is past due, the periodic synchronization fully updates the next forecast that is now due.

Update from Opportunity

A salesperson submits a forecast and afterward changes an opportunity. The salesperson’s manager rejects the forecast to make it available for changes. By default, the forecast items aren’t synchronized with the opportunity that was changed after forecast submission and before the forecast was rejected. If the salesperson enables Refresh from Opportunity at the forecast level, then any changes from the opportunity appear immediately in the forecast.
25 Setting Up Predictions

Sales Prediction: Overview

Sales prediction features enable organizations to capture and leverage predictive sales intelligence. Predictive models analyze sales data to evaluate buying patterns. After the evaluation of model results, lead generation can be scheduled to disseminate lead recommendations to users. Each lead recommendation includes win likelihood, average expected revenue, and sales cycle duration.

Summary of Features

This table lists sales prediction features.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Predictive Analytical Reports</td>
<td>These reports provide sales analysts with a summary of the prediction model results. Additionally, reports on the dashboard provide overviews of model performance and leads adoption.</td>
</tr>
<tr>
<td>Predictive Model Learning</td>
<td>Model learning uncovers hidden customer buying patterns. Salespeople can replicate sales success using historical insight generated through model training.</td>
</tr>
<tr>
<td>Rule-based Recommendations</td>
<td>When new products are launched or during initial deployment, historical data is sparse. In such cases, the sales analyst can create customer-, industry-, or product-specific rules to drive the recommendation of new products.</td>
</tr>
<tr>
<td>Higher Lead Adoption Rate</td>
<td>By using a combination of data mining, segmentation, prediction and business rules, sales prediction functionality ensures that the recommendations have a higher likelihood of being converted to a win.</td>
</tr>
<tr>
<td>Analyze Recommendation Performance</td>
<td>Built-in analytical reports verify whether the recommendations are being accepted by the sales organization. If adoption is low, then the predictive models can be fine-tuned by selecting different attributes for model learning or editing the rules. Simulation can then be performed to assess the impact of these new changes before publishing new recommendations.</td>
</tr>
<tr>
<td>Usage across your sales application service</td>
<td>The recommendations generated can be viewed when using other sales application capabilities such as managing customers and contacts. When reviewing customer details, recommended products display next to the customer with the rationale for the recommendation. Territory managers can use sales prediction metrics to set sales targets by territory and assign them to salespeople. Metrics ranking also determines whether leads can be qualified during the lead qualification process.</td>
</tr>
</tbody>
</table>
Initial Tasks for Sales Predictions

Getting Started with Sales Prediction: Prerequisites

This topic describes the sales prediction user roles, and takes you through the sales prediction prerequisite tasks.

User Roles and Prerequisites

The following lists the sales prediction user roles:

- Sales Analyst: Identifies interesting sales trends and customer behavior insights useful to help the overall sales organization to target customers more effectively.
- Sales Administrator: Performs ongoing administrative tasks, corrects erroneous or incomplete data, and configures the application according to business needs.

The following table lists the sales prediction prerequisite steps:

<table>
<thead>
<tr>
<th>Step</th>
<th>Task</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Run attribute analysis report to identify quality of customer attributes.</td>
<td>Sales Analyst</td>
</tr>
<tr>
<td>2</td>
<td>Select model entities and attributes based on the attribute analysis report.</td>
<td>Sales Analyst</td>
</tr>
<tr>
<td>3</td>
<td>Select products suitable for recommendation.</td>
<td>Sales Analyst</td>
</tr>
<tr>
<td></td>
<td>Set configuration parameters.</td>
<td>Sales Administrator</td>
</tr>
</tbody>
</table>

The next sections describe the following steps:

- Running Attribute Analysis Report
- Selecting Entities and Attributes
- Selecting Products for Recommendation
- Setting Configuration Parameters

Running Attribute Analysis Report

You must understand the quality of your data to optimize results. Quality data that is well-populated and has good distribution of values ensures best results. If data quality is poor, you can still use it but you must take steps to improve data to maximize results.

Use the Attribute Analysis Report to obtain detailed data distribution and importance metrics for each attribute across entities. Based on the analysis report, select the most appropriate attributes for model training. Attributes that have fewer null values and higher importance are good candidates for predictions.
To run the attribute analysis report:

1. Sign in as a sales analyst.
2. Select Sales, then Recommendations.
   The Customer Asset Analysis page appears.
3. Click the bi-directional arrows icon on the right to display the Recommendations page.
4. Click the Perform Attribute Analysis task under the Models heading.
   The Perform Attribute Analysis page appears.
5. Click Create in the Scheduled and Completed region.
   The Create Attribute Analysis Report page appears.
6. Enter details as required and click Continue.
   The Attribute Analysis Report appears with detailed analysis and the importance of each attribute in the selected entities.

Selecting Entities and Attributes
Sales prediction functionality generates model training results from historical sales data based on selected model entities and attributes. Based on the findings in the attribute analysis report and your expertise, you can select attributes from each entity that are important predictors for recommendations. You can add or remove attributes easily if the report determines that they add to the predictability of the recommendations.

For example, an entity like Customer may have two attributes of high data quality, residential address and annual income. Only if you have a high annual income, you can live in Palo Alto, CA. The analyst may choose to select one of many attributes that have the same impact on prediction to avoid redundancy.

To select entities and attributes:

1. Sign in as a sales analyst and navigate to the Recommendations page.
2. Click the Select Entities and Attributes task under the Tools heading.
   The Select Entities and Attributes page appears.
3. Select the entities and attributes that you want to include for model training and rules.
   To select attributes, click the respective entity and select attributes from the list of available attributes.
4. Click Save and Close.

Selecting Products for Recommendation
In this step, you select the set of products that will be recommended to customers. Select products based on your organization’s business needs. For example, you may select products based on the sales performance of the past products or expected sales of new products according to the ones you want to promote at a given point. However, after you run model learning, from the set of recommendable products, only products that are relevant to a specific customer are recommended.

To select products:

1. Sign in as a sales analyst and navigate to the Recommendations page.
2. Click the Select Products for Recommendation task under the Tools heading.
   The Select Products for Recommendation page appears.
3. Click Add under the Selected Products region.
   The Browse Catalog page appears.
4. Search for and select the product groups or products for recommendation.
5. Click **Submit** under the **Products for Recommendation** heading.
   - The Select Products for Recommendation page appears.
6. Click **Done**.

**Setting Configuration Parameters**

Sales prediction functionality contains a set of configuration parameters already preset with default values. You can edit these parameters to define how you want the application to function.

To set configuration parameters:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Recommendations
   - Task: Manage Recommendation Configuration Parameters
2. On the Manage Recommendation Configuration Parameters page, select the configuration parameter that you want to set, and click the **Edit** icon.
3. In the Edit Configuration Parameter popup window, set the value and click **Save and Close**.
4. In the Manage Recommendation Configuration Parameters page, click **Done**.

**Related Topics**

- Accessing Tasks to Update Existing Setup Data: Procedure

**Implementation Concepts for Sales Predictions**

**Prediction Models or Prediction Rules: Critical Choices**

This topic explains how you can leverage predictions based on either the predictive models or business prediction rules, or both, to generate sales leads for your company’s marketing functions. Simulating product recommendations also uses the model or prediction rules.

⚠️ **Note:** Sales prediction rules and models currently ignore customer assets that are bought from competitors and marked as competitor assets in the Asset table. Recommendations cannot be generated based upon competitor assets. The Competitor Assets field for Asset object is not ready-to-use by default but can be enabled in Application Composer.

**Predictive Models**

Use the predictive models if you have existing product lines with enough historical opportunity revenue data that provide strong statistical correlations between customers and buying patterns for meaningful results. The predictive models find target customers for products and predict the estimated revenue and sales cycle by customer.

**Prediction Rules**

Set manual prediction rules if you have:

- New product offerings
• Little to no historical data
• Historical data available, but not prescriptive of future trends, based on sales and marketing insight
• Discontinuity in market trends so that the past is no longer an indication of the future (for example, economic, social, or political changes)

Analysts create prediction rules to support sales objectives. Oracle Business Intelligence analyzes the available historical data and provides metrics for a target product or product group.

Prediction rules can be formulated leveraging the analysis of the predictive models. For a given product with insufficient data, analysts can identify customers to target for similar products based on the analysis conducted for a corresponding, similar product. The insight gained from this analysis can augment the analysts’ and product experts’ knowledge of the sales environment. Effectively, the evaluation of the predictive model can serve as a basis for prediction rule formulation and for the sales prediction metrics values made available to sales users.

Working with Sales Prediction Features
This topic helps you start working with sales prediction capabilities. It takes you through steps to analyze attributes, run model training, and generate leads.

Using Sales Prediction Features
Once the prerequisite tasks are complete, the sales analyst can perform the following tasks:

1. Schedule model training.
2. Analyze model training results.
3. Write prediction and eligibility rules.
4. Simulate product recommendation.
5. Generate leads.

Scheduling Model Training
After selecting products, you must schedule model training and check how the model training results look.

1. Click the Train Model task under the Models heading.
   The Train Model page appears.
2. Click Create in the Scheduled and Completed region.
   The Create Predictive Model Training Process page appears.
3. Enter details start and end dates, and click the Continue button.
4. Click Submit, and then click OK.
   The model training process is scheduled. View the table under the Scheduled and Completed region for the status of the process. Once the process is completed, model training results are available for review.
   You can now analyze the predictive model to identify products that customers are most likely to buy.

Analyzing Predictive Models
1. Review the Model Insight on the Overview page and details of model results in the Analyze Model Results task.
2. You can identify the products with low likelihood to buy, expected revenue, or high time to close and decide whether you want to eliminate these products from the set of recommendable products or write rules to support them.
These occurrences may be due to inaccurate or incomplete data and can be reviewed periodically.

Writing Rules

1. Click the **Manage Rules** task under the **Rules** heading.
2. Create prediction or eligibility rules to improve the quality of your recommendations.

   Eligibility rules are used to restrict products from being recommended due to lack of inventory, governmental restrictions, and so on.

   ✏️ **Note:** Eligibility rules always override model results and prediction rules.

Simulating Product Recommendation

After you run model training and define rules, you can select a subset of customers and conduct a simulation.

1. Click the **Simulate Recommendations** task under the **Tools** heading to simulate recommendations.
2. Review the product recommendations for the selected customers and generate leads if the recommendations look accurate.

Generating Leads

When you are satisfied with the simulation results, generate leads:

1. Click the **Generate Leads** task under the **Leads** heading to generate leads.

   The Generate Leads page appears.

2. Click **Create** and fill the required fields in the Create Predictor Lead Generation Process page.
3. Click **Continue**, and then click **Submit**.
4. Click **OK** on the confirmation dialog box.

   On the Generate Leads page, you see the report icon in the **View Report** column after the leads preview process has completed successfully.

5. Click the report icon for your lead.

   The Preview Leads page appears.

6. Preview the leads in the **Leads Report** region and select leads that you want to generate.
7. Click **Generate Leads**.

   Your leads are generated.

Once you schedule leads, they are available for other sales application capabilities such as managing opportunities and customers.

✏️ **Note:** If you are modifying the Leads object and your organization is using sales prediction to generate leads, then you must set default values for any user-defined required fields on the Leads object. For example, the sales prediction engine does not generate values for user-defined required lead attributes. Therefore, to successfully use the lead generation feature to create leads, you must enter a default value for any modified Lead attribute which is marked as **Required**.
Sales Prediction Profile Options and Lookups: Explained

Sales prediction seed data, such as profile options and lookups, are configurable options that affect how the sales prediction feature operates. You can configure and control sales prediction application data centrally by managing profile options from the Setup and Maintenance work area. Lookups are lists of values in applications. You define a list of values as a lookup type consisting of a set of lookup codes.

Sales Prediction Profile Options

Profile options can be set at different levels, such as user, product, or site level. The application gives precedence to certain levels over others, when multiple levels are set. The allowed levels come preconfigured with the application. Values defined at the user level take precedence over those at the site level. If a value is not defined at the user level, the site level value is used. The product level affects a product or product family. The application gives it priority over Site level. However, if the user level is set, the user level takes precedence. The effect of setting each of the sales prediction profile options is described in the following table:

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ignore Products that have no Closed Revenue</td>
<td>Enable the association model to ignore products that have no associated closed revenue lines.</td>
</tr>
<tr>
<td>Attribute Values Breakdown Displayed</td>
<td>Displays the top and bottom values for the selected attribute.</td>
</tr>
<tr>
<td>Confidence Display Threshold</td>
<td>Sets the confidence by a percentage value.</td>
</tr>
<tr>
<td>Number of Top Customer Attributes Displayed</td>
<td>Specify the number of attributes to be displayed in the bar graph for the selected product.</td>
</tr>
<tr>
<td>Customer Asset Date Range</td>
<td>Specify the default date range for the customer asset analysis report.</td>
</tr>
<tr>
<td>Number of Top Values Displayed for Selected Dimension</td>
<td>Specify the number of top values to be displayed for dimensions, such as Geography, Territory, or Industry.</td>
</tr>
<tr>
<td>Number of Top Installed Base Products by Dimension</td>
<td>Specify the number of top installed base products to be displayed for the selected dimension, such as Geography.</td>
</tr>
<tr>
<td>Top Attribute Values Displayed</td>
<td>Controls the number of slices in the data distribution values pie chart.</td>
</tr>
<tr>
<td>Association Model Confidence Default</td>
<td>This parameter controls the default setting for Association Model confidence.</td>
</tr>
<tr>
<td>Association Model Lift Default</td>
<td>Controls the default lift setting for Oracle Data Mining ODM Association model.</td>
</tr>
<tr>
<td>Association Model Rule Support Default</td>
<td>Controls the default value for rule support.</td>
</tr>
<tr>
<td>Sales Predictor Leads Date Range</td>
<td>Displays the chart for the set number of historical days.</td>
</tr>
<tr>
<td>Lead Preview Report Displayed</td>
<td>Controls the display of lead preview report in a deployment.</td>
</tr>
</tbody>
</table>
Sales Prediction Lookups

Lookups provide a means of validation and lists of values where valid values appear on a list with no duplicate values. The effect of setting the sales prediction lookup is described in the following table:

The following table displays the sales prediction lookup type, values, and description.

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Lookup Values</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source for Recommended Products</td>
<td>• Manual&lt;br&gt;Products for recommendation have been added manually.&lt;br&gt;• Auto&lt;br&gt;Products have been selected for recommendation based on model learning.</td>
<td>Products can be selected for recommendation through model learning or manual selection.</td>
</tr>
</tbody>
</table>

Related Topics

- Profile Options: Explained
- Lookups: Explained

Model Rule Entities and Attributes

Rules Management: Explained

This topic explains how to manage prediction and eligibility rules efficiently.

Rule Types

Rules are of two types:

- Prediction rules
- Eligibility rules

Rule Folders

Rule folders enable you to logically group and manage multiple rules and rules sets.

Rule folders enables you to:

- Manage your rules by campaigns, seasonal events, sales regions, or any such logical grouping that relates to the context for creating the rule.
For example, you can create a folder for North American sales campaigns and logically group any type of rule pertaining to campaigns for this region.

- Group both prediction and eligibility rules within a rule folder.
- Set a rule folder to test or production.

A test folder allows you to create rules and view the impact in a test environment without impacting recommendations in consuming applications. When you are satisfied with the simulation results, you can change the status of the folder to Production and the prediction rules will immediately appear as recommendations in other applications. Only recommendations based on active rules within production folders are visible in other applications. Additionally, rule-based leads are generated using active rules within production folders.

Views: Rule Folders and Rules
You can choose what the search results display by selecting either Rule Folders or Rules view. Rule folders view is the default view where the search results display all the rule folders that exist. You can view all rules or rule folders that impact a product across prediction and eligibility rules.

You can search by the folder name in the Rules view to view all the rules that a folder contains. In the Rules view, you can also view and compare across both prediction and eligibility rule types based on what the search results display. For instance, you can view all rules that specify conditions for a specific product. You can view the rule conditions in the Rules view and these conditions are also displayed in the Recommendations Rationale for the recommendation.

Sales Prediction Rules: Explained
This topic explains the types of rules used in sales prediction. Use rules to identify target customer segments for target products. The results provide salespeople with quality leads with the best products to sell to specific accounts.

Sales prediction features enable you to create two types of rules:
- Prediction rules
- Eligibility rules

Prediction Rules
Products with little or no past sales history, products that must be promoted due to lack of demand, and products that must align with marketing initiatives are some of the situations where a company might create prediction rules. Many companies have product experts who have deep market and industry insight about the best customers they should target for their products. They use the information provided by the data mining model to validate their knowledge and to extract correlation patterns. Then they write their own prediction rules to control product recommendations and predictions. For example, you can create a prediction rule to recommend a new mobile product called Mobile Talk that has no historical data, to customers of a specific age group.

Eligibility Rules
You can create an eligibility rule to define conditions that a customer must meet to be eligible for a product recommendation. Eligibility rules apply to both prediction rules and models. You can have rules which prevent the sale of certain products to certain customers. Management of eligibility rules can ensure the model derived recommendations don’t inadvertently violate these rules. For example, you can have an eligibility rule that ensures that you do not recommend the Mobile Talk mobile to customers in Asia because it will not work there. Achieving sales objectives through prediction rules and compliance with sales policies by eligibility rules help determine which products to select for recommendations. Eligibility rules always win over prediction models and rules.
Model and Rule Entities and Attributes: Explained

This topic explains some of the factors that can influence the selection of model and rule attributes and entities for sales prediction capabilities. Sales prediction functionality capitalizes on the power of predictive analytical models to mine and identify patterns in historical data to identify products to sell to your customers.

The decision regarding the selection of entities and attributes is critical. In some cases, the selection of certain entities and attributes may seem logical based on market expertise. For example, customers in certain industries have a stronger affinity for certain products. However in other cases, the model analysis provides the necessary insight into sales patterns and finds attribute values that correlate strongly with sales wins. Additional factors which weigh into the selection of attributes include the availability and accuracy of the attribute data. Finally, attributes that are well-populated may not turn out to be significant in prediction of a sales win.

While selecting attributes, you must not select similar attributes for model training. For example, Annual Revenue and Annual Revenue Category. Your customer’s annual revenue might range from 250,000 dollars to 50 million dollars. However, for efficient management, you decide to target only five customer types based on the Annual Revenue Category. For example, Small (250,000 dollars to 1 million dollars), Medium (1-5 million dollars), and so on. The Annual Revenue Category uses Annual Revenue for this classification. Therefore, you must use either Annual Revenue or Annual Revenue Category but not both as they are redundant. Similar duplicate attributes could manifest in multiple areas such as Number of Employees and Company Size, Location and Postal Code, and so on.

Sales prediction capabilities also allow the inclusion of expert insight from product management, sales, and marketing operations. You can enforce these expert insights through prediction rules. The same set of entities and attributes are available for both models and rules.

Product Selection: How it Works with Prediction Models and Rules

This topic provides an overview of how product selection filtering works with prediction models and rules. You must select products within sales predictor before you run prediction model or write rules. Your company catalog contains many products but you may want to select only the top 20% high value products as eligible for prediction and recommendation management.

Product Selection for Prediction Models

When you create a model learning job, products selected from the Select Products for Recommendation task are available for further selection. You can filter products by selecting the right hierarchy level to select either a product group or a specific product. For example, if you want to select the product Vision TV, filter to the appropriate hierarchy level from where you can select specific products. Model training runs only on the products that you select.

Product Selection for Rules

If you are writing prediction or eligibility rules, you must select products manually using the list that you already selected from the Select Products for Recommendation task.

If you want to create a restriction on a product selected using the Select Products for Recommendation task, you can create a rule for that product. From the products selected, if there is a product without sufficient transaction history for models to learn on, you can create a rule for the product.

An eligibility rule further restricts the recommendation of products. If a product is not eligible for purchase by certain customers, you can exclude that product from the recommendations for those customers.
Attribute Analysis Report: Explained

This topic describes how to understand and analyze an attribute analysis report.

To schedule attribute analysis, access the Perform Attribute Analysis task under Models on the Recommendations page. Once the status of the attribute analysis report shows Succeeded, click the Job ID to view the report.

Attributes can be categorical or numeric. For example, Country is a categorical attribute and Revenue a numeric attribute. The table below provides an example of a numeric attribute with sample values and description of each column in the report.

<table>
<thead>
<tr>
<th>Column Header</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entity</td>
<td>Customer</td>
<td>The entity that holds various attributes within.</td>
</tr>
<tr>
<td>Attribute</td>
<td>Annual Revenue</td>
<td>Attributes within an entity that contribute to prediction.</td>
</tr>
<tr>
<td>Null percentage</td>
<td>10%</td>
<td>Percentage of attribute values that is null.</td>
</tr>
<tr>
<td>Distinct Values</td>
<td>N/A</td>
<td>Count of distinct attribute values (applicable to categorical attributes only).</td>
</tr>
<tr>
<td>Distinct Value Percentage</td>
<td>N/A</td>
<td>Percentage of distinct attribute values (applicable to categorical attributes only).</td>
</tr>
<tr>
<td>Median</td>
<td>45,000</td>
<td>Applicable to numeric attributes only.</td>
</tr>
<tr>
<td>Average</td>
<td>56,000</td>
<td>Applicable to numeric attributes only.</td>
</tr>
<tr>
<td>Minimum</td>
<td>23,000</td>
<td>Applicable to numeric attributes only.</td>
</tr>
<tr>
<td>Maximum</td>
<td>1,12,000</td>
<td>Applicable to numeric attributes only.</td>
</tr>
<tr>
<td>Standard Deviation</td>
<td>5200</td>
<td>Measure of variance of the data.</td>
</tr>
<tr>
<td>IQR</td>
<td>23,000</td>
<td>Inter-quartile range indicates the difference between upper and lower quartiles.</td>
</tr>
<tr>
<td>Importance</td>
<td>0.89</td>
<td>Importance of the attribute.</td>
</tr>
<tr>
<td>Rank</td>
<td>1</td>
<td>Rank of the attribute based on its importance.</td>
</tr>
</tbody>
</table>
Analyzing the Report

Null Percentage and Rank are significant in identifying the best attributes, and have to be interpreted in conjunction with one another.

The table below provides an example.

<table>
<thead>
<tr>
<th>Entity</th>
<th>Attribute</th>
<th>Null Percentage</th>
<th>Importance</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td>Annual Revenue</td>
<td>10%</td>
<td>0.89</td>
<td>1</td>
</tr>
<tr>
<td>Customer</td>
<td>Industry</td>
<td>30%</td>
<td>0.47</td>
<td>3</td>
</tr>
<tr>
<td>Asset</td>
<td>Asset Name</td>
<td>70%</td>
<td>0.59</td>
<td>2</td>
</tr>
</tbody>
</table>

In the example above, you notice the following:

- The null percentage of Asset Name is 70%, which means that 70% of data for this attribute is missing. Therefore, you conclude that the data is insufficiently populated and may not be suitable for prediction.
- Although Asset is ranked 2, Customer has fared better with lower null percentage. Therefore, you conclude that Asset is not contributing much to prediction and you decide to remove this attribute.

You access the Select Entities and Attributes page to delete attributes.

Managing Prediction Rules: Examples

This topic provides scenarios where you might want to use prediction rules. Prediction rules identify target customers for target products to provide quality leads for sales.

Introducing a New Product

Sales executives determine that a new product will sell well to large manufacturing customers in North America who have previously bought an earlier model. The sales administrator creates a new prediction rule for the new products with the following conditions:

- Employee size > 10,000
- Industry = Manufacturing
- Region = North American
- Asset = the name of the prior model

The product expert predicts the expected revenue of 500,000 dollars if the targeted product is sold to customers who meet the rule criteria and predicts that the sales cycle should take 30 days. He sets the likelihood to buy at 95 percent.

Improving Product Sales

A product specialist researches why a product is not selling as well as expected. He checks the model quality reports for the product and discovers that the model is of low quality. Sales executives are sure that the product will sell well to pharmaceutical companies in the eastern United States, so the sales administrator creates a new prediction rule for the product that includes these customer conditions.
Dealing with Incorrect Data

The company hired several new salespeople six months ago. Since then, the company has discovered that these new salespeople used old product codes when selling several products. The model is missing accurate historical data for these products. Therefore, the company uses prediction rules based on expert knowledge to generate leads missed by the model.

Selecting Model and Rule Entities and Attributes: Examples

This topic provides some examples of selecting model and rule entities and attributes. Based on model learning insights and your market expertise, you can select entities and attributes that are most important predictors of customers’ likelihood to buy a specific product. To achieve better predictions, you should select only well-populated attributes from the attribute analysis report. Only the selected entities and attributes are available for rules and model learning. The scenarios below provide examples.

**Scenario**

**Account Type Customer**

Your company sells a service that appeals to larger customers, and another service that targets smaller customers. If a customer purchased one of your product packages, then the customer already has all service needs covered by that package. You want to know, given a product recommendation, if annual revenue, line of business, customer size, and asset owned are important predictors when it comes to recommending this particular product.

You select the following entities and attributes:

- **Account**
  - Annual Revenue
  - Line of Business
  - Customer Size Code
- **Past Purchased Products or Services**
  - Assets and Service Contracts

The selected entities and associated attributes can be used to identify buying patterns that have affected wins in the past. Over time, you can further refine the selections based on availability of data and the cost to integrate that data for evaluation.

**Scenario**

**Contact Type Customer**

Your company wants to sell a new mobile product that has no historical sales data. You want to create rules to recommend this product to young customers.

You select the following entity and attribute:

- **Contact**
  - Date of Birth

You can now select this attribute among the attributes available in the Create Prediction Rules page to create your rule that targets the new mobile product to customers born before a certain date.
Eligibility Rules: Examples

This topic provides examples of when you can use eligibility rules to eliminate ineligible customers from product recommendation simulations and sales leads generation, when the simulation and lead generation use prediction rules.

Government Regulations

You sell software and government regulations prevent you from selling certain types of software to certain countries. You write rules to prevent recommendations of these products to any customers with locations in these countries.

Customer Criteria

You sell two similar chemicals, both used in manufacturing, but only one meets the criteria for use in the health care industry. You write a rule to designate customers in the health care industry ineligible for one of the chemicals.

Cross Selling

One of your product lines is only sold to new customers because of its low profit margin. You write a rule to prevent the line from being offered to anyone as a cross sell.

Assets

You are starting a sales campaign that features your latest model microscope. You do not want to offer this model to any customer who purchased the previous model within the last year. A rule designates the new model ineligible for any customer who purchased the previous model within one year.

Selecting Best Attributes: Worked Example

You can use two methods to identify and select the most predictive attributes for model training:

- Train, Analyze, Retrain: This method involves training the model on a set of attributes, reviewing the results to assess their prediction accuracy, and retraining the model with an updated attribute set.
- Run Attribute Analysis Report: This method uses the model to identify attributes that are well-populated and compares the importance of an attribute to its peers.

This example shows how to select the best attributes to derive quality model-based predictions. In this scenario, you are a sales analyst responsible for North America sales performance. You want to analyze your model prediction and choose the best attributes for further model training. You want to focus on the product 8000RT Server.

Analyzing Prediction Model

1. In the Tasks region, click Analyze Model Results under Models.
2. In the Analyze Models Results page, find the 8000RT Server product.
3. Click the product to view the model reports.
4. Analyze the attributes for likelihood to buy.

Based on your analysis, you find that there is a strong association between customers in high technology industry and the sale of 8000RT Server. Additionally, customers who own the 6000RT server tend to buy the 8000RT server as its replacement. This is determined based on the likelihood to buy and rule support values of 8000RT server. You
can use this association to create rules to target future sale of 8000RT server to customers in the high technology industry who already own 6000RT servers. Therefore, you decide to select the Industry attribute on the Select Entities and Attributes page.

Performing Attribute Analysis

The Attribute Analysis report helps you identify the best attributes for predicting win rates for an opportunity and a customer’s likelihood to buy a product, relative to those attributes that do not meaningfully contribute to model quality.

1. In the Tasks region, click Perform Attribute Analysis under Models.
2. Click Actions and Create.
3. The following table shows the fields and sample values that need to be completed to generate the report.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attribute Analysis Report Name</td>
<td>8000RT Servers 2011</td>
</tr>
<tr>
<td>Start Date</td>
<td>1/1/2011</td>
</tr>
<tr>
<td>End Date</td>
<td>12/31/2011</td>
</tr>
</tbody>
</table>

4. Click Continue.
5. In the Attribute Analysis Report Process page, click Submit.
6. In the confirmation dialog box, click OK.
7. Once the report is generated, click the 8000RT Servers 2011 report.
8. Review the report:

   Review the attribute rank and null percentage.
   - Attribute rank: The report ranks attributes based on their importance. Review the rank of each attribute.
   - Null percentage: Higher null percentage indicates poorly populated data. For example, if an attribute is ranked 1 but the null percentage is 90%, you would not select this attribute for model training as the ranking is only based on poorly populated data.
   - Median and Average: Review the median and average to further analyze the distribution of data.

You will notice the following:
- Small Business Indicator is one attribute that is ranked high in the report and the null percentage is very low.
- Annual Revenue is also ranked high, but the null percentage is also very high.
- You decide to select Small Business Indicator and remove Annual Revenue before running model training again.

Selecting Attributes

You must select or deselect attributes from the Select Entities and Attributes task.

1. In the Tasks region, click Select Entities and Attributes under Tools.
2. In the Select Entities and Attributes page, click Account under the Model region.
3. In the Available Attributes region, search for Small Business Indicators and move it to Selected Attributes.
4. Click OK.
Note: For each Entity, add attributes that attribute analysis report recommends to be most important for predicting win rates.

5. Click Save and Close.

Now that Small Business Indicators is selected, model training should improve the association between attributes. Similarly, select the Industry attribute under the Rules region.

Retraining the Model

You must run model training again with the updated set of attributes.

1. Run model training.
2. Click Analyze Model Results to review the updated association model report.

You are satisfied with the results and you are ready to generate leads and recommendations.

Generating Leads Using Models and Rules: Worked Example

This topic shows an example of using predictive model and prediction rules to generate sales leads.

You are a sales analyst responsible for reviewing, analyzing and measuring North America sales performance. The sales plan for the new quarter emphasizes selling several servers, and you want to provide high quality leads at the earliest. You have trained the predictive models with the past years' sales opportunity revenue data and used the model to generate sales leads for the past two quarters. The specific servers your company wants to sell this quarter are:

- 8000RT Servers
- 900VR Servers
- 550VR Servers
- DG 150 Green Servers, a newer product

To generate leads for these products, you first analyze model results, create prediction rules where model results do not support your business needs, simulate product recommendation, and then finally generate leads.

Analyzing Model Results

1. In the Models region, click the Analyze Model Results task.
2. In the Analyze Model Results page, view the association model report to analyze the predictions.

Association model reports show that customers in the high technology industry located in the US tend to buy new products like the DG 150 Green Servers based on past history.

Creating a Prediction Rule

Based on the insight from the model report and your business knowledge, you create a rule for this product.

1. In the Tasks region, click Manage Rules.
2. In the Manage Rules page, select Rules in the Show field.
3. Click the Create Rule icon and then click Prediction Rule.
4. In the Create Prediction Rule page, enter the fields, as shown in this table.
### Setting Up Predictions

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Rule Name</strong></td>
<td>Target High Tech Customers in the US</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>US High Technology customers are great sales targets for DG 150 Green Servers. Likelihood-to-buy &gt; 70%</td>
</tr>
<tr>
<td><strong>Start Date</strong></td>
<td>01/06/2012</td>
</tr>
<tr>
<td><strong>End Date</strong></td>
<td>01/06/2013</td>
</tr>
</tbody>
</table>

5. In the **Rule Folder** field, click **New**. In the Create Rule Folder page, enter the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Folder Name</strong></td>
<td>DG 150 Green Servers</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Prediction rules for DG 150 green servers</td>
</tr>
<tr>
<td><strong>Folder Status</strong></td>
<td>Test</td>
</tr>
</tbody>
</table>

> **Note:** Change the status to **Production** after you run simulation and you are satisfied with the results.

When you set the folder status to **Production**, recommendations based on the rules in this folder are immediately visible in consuming applications.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Start Date</strong></td>
<td>01/06/2012</td>
</tr>
<tr>
<td><strong>End Date</strong></td>
<td>01/06/2013</td>
</tr>
</tbody>
</table>

6. Click **OK**.

7. In the **Record Type** list, select **Account**.

8. In the Target Products region, click the **Select and Add** icon.

9. In the Select Target Products page, search for and add **DG 150 Green Server**.

10. Complete the fields, as shown in this table.

The application computes likelihood, revenue, and sales cycle estimates based on the model analysis. These values can be used as recommended, as guidance for defining and refining your own values, or overridden entirely in favor of realizing sales objectives.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td>DG 150 Green Servers</td>
</tr>
<tr>
<td><strong>Estimated Likelihood to Buy</strong></td>
<td>75</td>
</tr>
</tbody>
</table>
11. In the Conditions region, select Recommend the target products to a customer if all the conditions hold from the Connective list.
12. Click the Add Row icon.
13. Use selections to enter the following condition: Customer / Country = US.
   Only those attributes that are selected in the Select Model and Rule Entities and Attributes page are available here for selection.
14. Click the Add Row icon.
15. Use selections to enter the following condition: Customer / Industry = High Technology.
16. Click Save and Close.

Simulating Recommendations
Based on the analysis of the model results and the prediction and eligibility rules for the servers, you can conduct a simulation to ensure that the correct customers are targeted for the servers under evaluation.

1. In the Tasks region, click Simulate Recommendations.
2. Complete the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated Revenue</td>
<td>150000</td>
</tr>
<tr>
<td>Estimated Sales Cycle</td>
<td>40</td>
</tr>
<tr>
<td>Record Type</td>
<td>Account</td>
</tr>
<tr>
<td>Based on</td>
<td>Rules</td>
</tr>
<tr>
<td>Rule Folders</td>
<td>Production: Select All.</td>
</tr>
<tr>
<td></td>
<td>Test: Select the appropriate test folders.</td>
</tr>
<tr>
<td>Number of Recommendations</td>
<td>10</td>
</tr>
<tr>
<td>Ranked by</td>
<td>Likelihood to Buy</td>
</tr>
<tr>
<td>Recommended only if likelihood to buy is at least</td>
<td>70%</td>
</tr>
<tr>
<td>Customer Account 1</td>
<td>Pinnacle Technologies</td>
</tr>
<tr>
<td>Customer Account 2</td>
<td>Maple Networks</td>
</tr>
</tbody>
</table>
Field | Value
--- | ---
Customer Account 3 | Serenity Systems

3. Click **Simulate**.
4. Mouse over each of your target products for each customer to review the likelihood to buy, estimated revenue, and estimated sales cycle.

The simulation results look to be accurate for the three customer accounts based on your evaluation of the model results for the servers under evaluation. The simulation verifies the model analysis and the rules, instilling confidence in generating and distributing leads. You are confident that generating leads will fulfill your sales objectives for three of the servers.

**Scheduling Sales Leads Generation**

1. In the Tasks region, click **Generate Leads**.
2. Click the **Create** icon.
3. Complete the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td>Create Sales Leads for West Region</td>
</tr>
<tr>
<td><strong>Record Type</strong></td>
<td>Account</td>
</tr>
<tr>
<td><strong>Generated By</strong></td>
<td>Prediction Rules</td>
</tr>
<tr>
<td><strong>Production Rule Folders</strong></td>
<td>All</td>
</tr>
<tr>
<td><strong>Maximum Number of Recommendations per Customer</strong></td>
<td>5</td>
</tr>
<tr>
<td><strong>Ranked By</strong></td>
<td>Likelihood to buy</td>
</tr>
<tr>
<td><strong>Select Option</strong></td>
<td>By Sales Territory</td>
</tr>
<tr>
<td><strong>Territory Name</strong></td>
<td>Sales Overlay West</td>
</tr>
</tbody>
</table>

4. Click **Continue**.
5. Click **Advanced** and **Select to run as soon as possible**.
6. Click **Submit** and then click **OK**.

On the Generate Leads page, you will see the report icon in the **View Report** column after the leads preview process has completed successfully.

7. Click the report icon for your lead.
8. Preview and select leads that you want to generate from the Preview Leads page.

You can select multiple leads and save. Once you are ready with all your selections, you can generate leads.

9. Click **OK**.
10. Schedule a second lead generation by model analysis to generate leads for the three servers. Complete the fields, as shown in this table.
Analyze Leads Generated: Examples

This topic provides examples to illustrate how sales analysts analyze previously generated leads. A sales analyst can validate if leads are being generated as expected by simulating product recommendations before generating leads for select customer accounts. Use the Analyze Leads Generated task if you have a large number of customer accounts and products to analyze.

Customer Accounts

Your company has introduced a new television product called Vision. Since the product does not have any historical data, you create rules that can specify which customer accounts are eligible for recommendation based on their attributes. You generate leads and later you want to check the leads that were generated for Vision TV. Although you expected that this product will be recommended to 10 customer accounts, the Analyze Leads Generated report shows that the product was recommended to only eight customer accounts. You review the rules and find that there is an eligibility rule that specifies that the Vision TV cannot be recommended to customer accounts from UK. You now know that the leads generated were accurate and that no further changes are required.

Products

You analyze leads generated to check the number of products that were recommended to the customer account Maple Global. Only 13 products from your sales catalog were recommended to this customer account while you were expecting that 15 products would be recommended. You analyze this further and find that two products were new and there was no sufficient data for model learning to learn on. You then write rules specifying attributes for these two products and generate leads again. When you analyze leads generated, you see that all 15 products were recommended for Maple Global, as expected.

Using Reports to Analyze the Model: Example

You can use reports to analyze predictions and correlations found by predictive models. The following scenario illustrates how to use the association model report.

Association Model

Your company wants to improve sales of the 9800 Green Server product. Since this product has been around for some time, you are mining historical data to review trends. Search for the 9800 Green Server on the Analyze Model Results page to review the association model report. The association model report shows three factors that influence buying patterns for the 9800 Green Server:

- 750VR Server product
• High technology customers
• High revenue customers

Higher likelihood to buy and higher rule support are highly correlated with a customer buying the recommended product. The report shows that high revenue high technology customers are more likely to buy this server. It also indicates that most customers who own the 750VR Server also buy the 9800 Green Server. Based on these associations, create rules to generate leads for the 9800 Green Server.

What's the difference between eligibility rules and prediction rules?

Criteria in an eligibility rule define when a customer is eligible or ineligible for a specific product or product group. Analytical calculations process eligibility rules first before prediction rules to remove ineligible customers from further calculations. For example, customers who purchased Model 1000 Microscope within the last year are ineligible to purchase the new Model 2000.

Prediction rules are an alternative to using the statistical model to generate predictions and leads. You create prediction rules, based on your industry or product expertise, to identify products to sell to customers who meet predefined conditions. Use prediction rules when new products are introduced, to promote products with a poor sales history, or to push products to align with marketing initiatives. For example, recommend a new Model 2000 to customers who purchased Model 1000 Microscope three or more years ago.

What happens if a prediction rule conflicts with another prediction rule?

If two or more prediction rules overlap or conflict, then the prediction rule with the most recent update date takes precedence.

In this example, two rules overlap:

• Rule 1
  - Customers in the United States
  - Target product: Model 2000 Microscope

• Rule 2
  - Customers in the East United States
  - Target product: Model 2000 Microscope

If Rule 2 is edited last, then Model 2000 Microscope predicted metrics for East US customers override those from Rule 1 when the lead generation process is executed. The predicted metrics defined for Rule 1 apply to leads generated for customers within the US but not in the East US.

In this example, two rules conflict:

• Rule 1: Customers not in US target Model 2000 Microscope (essentially position this product to all customers everywhere but in the US)
• Rule 2: Customers in US target Model 2000 Microscope
The conflict between rules in this case, results in leads generated for Model 2000 Microscope to all customers (US or otherwise), which is not the intent. Each rule works to undermine the objective of the other.

**What happens if an eligibility rule conflicts with a prediction rule?**

Eligibility rules are always evaluated first before prediction rules. For example, if an eligibility rule states that a customer is ineligible for a certain product, then the customer is ineligible regardless of whether or not that customer is targeted for that particular product in the prediction rule.

**Can I modify rule attributes from one folder to another?**

Yes. From the Create Prediction Rule page or Create Eligibility Rule page you can change rule attributes only if the attributes satisfy the conditions of the parent folder. For example, you can change the folder name, start and end dates, and the Active status of the rule.

**What's current model quality?**

A number from 0 to 100 indicates the predictive power of a model. The higher the model quality value, the more impact the resulting predictions have against a random sampling of events. Therefore, the products with higher model quality can be targeted to prospective customers, improving sales success.

**Can I run multiple sales leads generation processes simultaneously?**

No. Only one leads generation process, or the model training process, can run at a time. The process you submit goes into the queue and runs after the process currently running completes.

**Model Training**

**What's model training?**

Model training (or learning) is the process of discovering intrinsic structures in the data using a set of algorithms. The algorithms extract patterns and relationships to make future predictions. The predictive models learn from historical opportunity revenue data and predict:

- What products a customer is likely to buy next
- The estimated revenue
- The projected sales cycle
When does the model need to be trained?

The model requires initial training to gather and analyze historical data. If your sales history is fairly stable and consistent, your initial results will still apply. If there are abrupt changes (such as market conditions, supplies, demand, or seasonality), you can conduct an entirely new model training.

Model Training: Example

This topic provides an example of model training. Model training discovers intrinsic structures in historical data and makes predictions for future leads and recommendations.

Scheduling Model Training

You are a sales analyst responsible for North America Sales in a server manufacturing company. You want to use the predictive model to mine historical data and use them to generate quality leads. You select 20 server products that you want to promote and run model training.

To schedule model training:

1. Click the Train Model task under the Models heading.
2. In the Train Model page, click the Create icon in the Scheduled and Completed region.
3. In the Create Predictive Model Training Process page, select the sales period that you want the model training to use for the prediction.
4. Click the Continue button.
5. Click the Submit button and then click OK.

You scheduled model training. You can see the status of your model training process on the Train Model page. You analyze the predictive model to check if the model findings are accurate and can be used to generate leads. When you analyze the reports, you realize that few old server products can only be recommended to customers who are already using a related product. You want to create an eligibility rule to ensure that the prediction model does not recommend these servers to customers who do not own the related product. You access the Manage Sales Prediction Rules task to create the eligibility rule.

After writing the eligibility rule, you run model training again.

Note: You can simulate product recommendations before generating leads.

You are now satisfied with the model predictions and you are ready to generate leads. After the initial model training, you can run model training incrementally.

Account Attributes for Model-Based Recommendations

Sales analysts can use account filters to better segment model-based recommendations. You apply the filters to target a segmented customer data set when opportunity and account data volumes are high. After selecting the filters you want, you can schedule model training and check the model training results with the applied filters.

You can apply expanded account related filters to the following standard or user-defined objects such as:

- Country
Account filters enable you to further refine your model data sets and you can specify user-defined names for your prediction models.

Use the following steps to apply account filters for your object:

1. Sign in as a sales user, such as a sales administrator or sales analyst.
2. Navigate to Sales > Recommendations.
   
   The Recommendations work area displays.
3. Click the Train Model task under the Models heading.
   
   The Train Model page appears.
4. Click Create in the Scheduled and Completed region.
   
   The Create Predictive Model Training Process page appears. From here, you can train the model using opportunity revenues that closed during the sales period.
5. Enter details for the start and end dates, and enter a name for your prediction model.
   
   If you want, you can also select a territory from the Territory list of values.
6. Click Add Row from the Actions drop-down list.
7. Select the Attribute, Filter, and Value for the attributes that you want.
8. Continue to add attributes, filters and values as required.
9. Click Continue.
11. Enter the details of when you want to schedule your predictive model training process.
12. Click Submit, and then click OK.

The model training process is scheduled. View the table under the Scheduled and Completed region for the status of the process. Once the process is completed, model training results will be available for review. You can now analyze the predictive model to identify products that customers are most likely to buy based on the account attribute filters you selected.

Product Recommendations

Sales Prediction Configuration Parameters: Explained

Sales prediction functionality provides configuration parameters that you can edit to influence how the application works. These configuration parameters control how recommendations are generated and displayed in other applications.

Configuration Parameters

The sales prediction parameters are listed in the following table.
### Configuration Parameters

<table>
<thead>
<tr>
<th>Configuration Parameter</th>
<th>Default Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AssocModelNumofTopCorrelationDrivers</td>
<td>5</td>
<td>Defines the number of association model correlation drivers displayed in the table and on graphs in recommendation rationale.</td>
</tr>
<tr>
<td>AssocModelRecommendationConfidence</td>
<td>0.5</td>
<td>Defines the minimum confidence threshold for recommendations when using association model.</td>
</tr>
<tr>
<td>AssocModelRecommendationRuleSupport</td>
<td>0.0001</td>
<td>Defines the minimum rule support threshold for recommendations when using association model.</td>
</tr>
<tr>
<td>AssocModelTrainingRuleSupport</td>
<td>0.0001</td>
<td>Defines the minimum threshold for association model rule support during model training. This value must be lesser than or equal to the recommendation rule support.</td>
</tr>
<tr>
<td>AssocModelTrainingConfidence</td>
<td>0.5</td>
<td>Defines the minimum threshold for association model confidence during model training. This value must be lesser than or equal to the recommendation confidence.</td>
</tr>
<tr>
<td>numberOfTopDrivers</td>
<td>3</td>
<td>Defines the number of top drivers to return for each recommended product. The values can range from 0-5.</td>
</tr>
</tbody>
</table>

### Recommendation Metrics: Explained

Sales prediction features provide recommendation metrics on top products that customers are likely to buy, along with sales cycle and revenue estimates.

Models and rules generate recommendations based on the following metrics:

- Likelihood to buy
- Recommendation rating
- Estimated revenue
- Estimated sales cycle

### Likelihood to Buy, Rule Support, and Lift

Sales prediction functionality uses the Oracle Data Mining association model to generate reports that show the likelihood to buy metrics.

The reports show the following metrics:

- Rule Support: Indicates the ratio of occurrence of the influencing customer attribute and recommended product together over the total number of records. Support value ranges between 0 and 1.
- Likelihood to Buy: Indicates the ratio that shows the occurrences of the influencing customer attribute over records containing the recommended product. Likelihood to Buy value ranges between 0 and 1.
• Lift: Indicates the improvement in predictive ability when using association model prediction over randomness. The baseline for lift is 1. If the lift is greater than 1, it indicates that the predictive ability while using prediction is better than randomness.

Recommendation Rating
Sales prediction functionality provides a star-rating system to help you analyze recommendations. The star-rating system uses a scale of 1 to 5 stars to indicate the strength of the recommendation. The recommendation rating is calculated using the likelihood to buy and average win rate metrics.

Estimated Revenue and Sales Cycle
Sales prediction features use native Oracle data mining capabilities to estimate revenue and sales cycle. Sales cycle is the interval between the time when the revenue line is created and the time when it’s closed. After a lead is generated, sales predictor estimates the revenue for the potential sale of a product to a customer.

Metrics - Model and Rules
When you run model training and analyze predictions, you will first see the metrics for likelihood to buy. You can select the estimated revenue, sales cycle, or the association model to view these metrics. When creating a prediction rule, a set of business intelligence generated metrics are populated automatically for each target product selected (if past sales data exist for the product). The business intelligence metrics are calculated based on predefined formulas which are different from the model predictions. Product experts can use the prepopulated metric values or override the values based on their expertise.

Metrics Usage
The recommendation metrics generate leads that are assigned to salespersons within opportunities. Sales prediction features also feed recommendations to manage customers, where salespersons can view product recommendations for specific customers and pursue these leads.

When do I simulate product recommendations?
Simulate product recommendation before generating leads, to preview what products are being recommended to specified customers from either model or rule predictions. Use simulation results to check if prediction rules are evaluated correctly.

When do I enter product recommendation estimates for a sales prediction rule?
For each product that you recommend in the prediction rule, the application provides calculated estimates for each of the three predictions: likelihood to buy, sales revenue, and sales cycle in days. These serve as a guideline for current sales performance of the product. You can override these predictions using your expert knowledge of the market.

If the product or product group is new or has insufficient past sales data, then no estimates are provided. You must enter estimates based on your market expertise.
Why are model-based recommendations or leads not visible in consuming applications?

Model-based recommendations or leads might not be visible in consuming applications because the configuration parameter `displayModelBasedRecommendations` might be set to False. The administrator should set this parameter to True for all model-based recommendations and leads to appear in consuming applications.
26 Setting Up Quotas

Sales Quota Management: Overview

Sales Quota Management provides a comprehensive solution for managing sales quotas to maximize quota attainment and improve overall sales performance. Effective top-down planning with bottom-up assessments ensures that quotas relate to corporate goals. After the sales plan is deployed for the year, sales executives can then monitor and track sales performance by comparing forecasts with actuals and with quotas.

Summary of Features

The key features of Quota Management include the following:

- Assign territory quotas to territories and resource quotas to people.
- Create sales goals such as number of sales calls.
- Review quotas assigned to you by your senior manager and allocate quotas to your salespeople.
- Compare quota to revenue, pipeline, forecast, and other metrics using business intelligence.
- Use formulas to calculate territory quotas using measurements of historical data and future potential.
- Add adjustments to your quota to cushion against attainment risk.
- Track current quota achievement compared with quota targets.
- Manage seasonal variations in sales by distributing the revenue quota among several calendar periods using seasonality guidance.
- Send notification to Incentive Compensation with new and changed individual quota assignments for all sales goals.
- Use a round trip export, update, import of quotas to add bulk quotas from spreadsheets.

Quota Components

Sales Quota Plan Components: How They Work Together

Quotas are a reflection of sales targets set for an individual in a sales organization. After a corporate goal is established, managers distribute quotas down through the sales territory hierarchy until all territories and their respective owners have quotas. Sales managers can compare quota projections based on historical sales information and metrics with quotas being set. You can use one sales quota plan for the fiscal year.

In this figure, a sales quota plan contains several territories, each assigned a quota. Territory quota formulas compute projected quotas based on historical sales information and metrics such as forecasts and market potential. The projected
quotas appear as default territory quota amounts. Distributing quota to your team using spread formulas allocates quota based on the contribution of each of the territories. You also assign quotas to individual resources.

Sales Quota Plan

The administrator can create one or more sales quota plans. Each sales quota plan covers a period of one year. Active territories become part of the new quota plan, and the administrator can add territory proposals to allow the setting of quotas for proposed territories. Sales quota plans are inactive until the administrator activates them.

Territories and the resources assigned to them change frequently. The administrator can synchronize the latest active and proposed territories with a selected quota plan by clicking Synchronize in the Manage Sales Quota Plans page. The administrator should also schedule the Synchronize Quotas process to run daily so that current and future quota plans that are active will use the latest territory hierarchy.

Note: The administrator can designate only one plan to be used for tracking quotas for the year.

Setting the available options for the quota plan is not required. For the sales quota plan options, the administrator selects an adjustment threshold, a territory quota formula, and a seasonality factor group to apply to all or to individual territories.
Territory options override sales quota plan options. For example, the territory quota formulas and seasonality factor groups selected for individual territories override those set at the quota plan level.

The administrator can also set a threshold percentage for adjustment amounts that managers often add to quotas.

In this figure, the assigned quota gets split over each month through seasonality factors that raise or lower quota amounts according to seasonal fluctuations.

**Territory Proposals**

You can associate territory proposals to your sales quota plan. When sales administrators or sales managers create new proposed territories, such as for a territory realignment, they can enable the setting of quotas for the proposed territories by selecting Eligible for Quota. If you then associate the proposals to your quota plan, you see the proposed territories within the current active territory hierarchy, and salespeople will be able to assign quotas to the proposed territories.

**Sales Goals: Explained**

A sales goal determines how quota is measured and defines what you want to measure. You set sales goal quotas for a resource, not for a territory. Commonly used sales quotas are simply salesperson targets for revenue achievement in their respective territories. Such sales quotas are modeled as Sales Revenue Goals. Allocating a quota for a sales revenue goal is required, and optionally quotas can be allocated for additional sales goals. Create additional sales goals, such as number of units sold, if you want to assign other quotas to your salespeople.

This figure shows the components of a sales goal. A sales goal supports a particular objective. You can use any unit of measure for your sales goal and specify what to measure, for example, number of units sold. The provided unit of measure

---

**Quarter Quota Amount**

- **Month 1 Quota**: 20 Percent
- **Month 2 Quota**: 30 Percent
- **Month 3 Quota**: 50 Percent

**Seasonality Factors Apply Percentages**
choices are amount and quantity, but you can also define your own unit of measure. Each sales goal contains only one measure. You can also focus the sales goal on one or more product groups.

The unit of measure can't be changed after the administrator creates the sales goal. The provided Sales Revenue Goal has a unique value for Goal Number of GOAL_1000. While quotas can be allocated to sales goals which have one or more associated product groups, there are no roll up reports available to compare these quotas against actual sales.

⚠️ **Note:** Do not make changes to the sales goal object using Application Composer.

### Multiple Quotas for One Resource

You can create multiple sales goals and assign multiple quotas to one or more sales goals for a resource.
This figure shows multiple quotas assigned to a salesperson within the current active quota plan year. The salesperson owns a territory and therefore has a Revenue Goal quota plus the two quotas manually assigned by the salesperson’s manager.

A resource can have only one quota per sales goal for the year. You can assign new quotas only for active sales goals. Inactivating a sales goal doesn’t affect existing quotas for that sales goal. When you submit notifications to compensation, quotas for all sales goals for the resource are included in the notification.

Territory Quota Formulas: Explained

Territory quota formulas calculate territory quota based on historical sales information and metrics such as forecasts and market potential. The calculated quotas appear as default territory quota amounts in the sales quota plan. The formulas execute a Multidimensional Expressions query on the territories Oracle Essbase cube.

Administrators can change parameters for formulas and set each formula to active or inactive.

Predefined Formulas

Following are explanations for a few of the predefined territory quota formulas.

- Scale a measure from a past period by a percentage

  Total the amounts for a selected measure for the past selected year. Calculate the stated percentage of the total and add it to the total.

  For example, 110 percent of closed bookings for fiscal year 2014.
• Percentage change in a measure value over 2 consecutive periods

Subtract the total amounts for a selected measure for one year from the total amounts for the subsequent year. Divide the difference by the total of the first year to determine the percentage of change. Calculate the percentage of the total value of the second year and add the result to the year’s total.

For example, closed bookings for 2014 minus closed bookings for 2013 divided by 2013 total gives the rate of change as 8 percent. Calculated quotas are 108 percent of the 2014 closed bookings.

• Percentage change in a measure value over 2 named time periods (current and past)

Subtract the total amounts for a selected measure for a selected year from the total amounts for the current year. Divide the difference by the total of the earlier year to determine the percentage of change. Calculate the percentage of the total value of the current year and add the result to the year’s total.

For example, closed bookings for 2015 minus closed bookings for 2011 divided by 2011 total gives the rate of change as 7 percent. Calculated quotas are 107 percent of the 2011 closed bookings.

Creating Formulas

Use the Essbase MDX Script Editor to create your own territory quota formulas. When you define a formula that includes a metric, use a parameter for the metric name, rather than defining the metric name as part of the formula expression.

For more information about MDX functions, see Oracle Essbase Technical Reference.

For more information about MDX queries, see Oracle Essbase Database Administrator's Guide.

What's a spread formula?

A spread formula calculates the distribution of an amount among selected child territories. For example, a spread formula takes the variance between the parent territory quota and the sum of the quotas for the child territories, and spreads it to the child territories.

The formula calculates the ratios to use for the child territories through the use of the metric defined for the selected spread formula. The formula examines each territory contribution of the metric value for a period, and compares it with the total value of the same metric for all the territories combined, to determine the percentage to apply to each territory. When a spread formula has no metric selected, then it distributes the amount evenly across the child territories.

What's the difference between plan duration and territory proposal duration?

The default publish by date is determined by the number of days set for the plan duration. Plan duration is added to the activation date of the quota plan to determine the publish by (or due) date by which quotas must be allocated.

If you have no value for the plan duration (null value), then the publish by date is also null. If you enter zero for the plan duration, then the publish by date is the same date as the plan activation date.

The territory proposal duration is added to the territory proposal activation date to determine the publish by (or due) date by which quotas must be revised.

If you have no value for the proposal duration (null value), then the publish by date is also null. If you enter zero for the proposal duration, then the publish by date is the same date as the territory proposal activation date.
Quota Administration

Managing Sales Quota Plans: Worked Example

This example shows how to create a new sales quota plan for the coming year.

You are the sales administrator and it is a month before the start of the fiscal year. You start the sales quota planning process by creating a sales quota plan for the year.

1. Review the provided territory quota formulas.
2. Create a new spread formula that sales managers can use to spread a quota amount among child territories.
3. Create a seasonality factor group that describes how to split quota over quarters and months. For example, you can split your annual quota to be achieved 10% in Q1, 20% in Q2, 30% in Q3 and 40% in Q4.
4. Create a sales quota plan. Select a fiscal year for which you want to allocate quota. Creating a quota plan automatically takes a snapshot of active territories. Assign seasonality factor groups to the plan. Associate the seeded territory quota formulas to the quota plan.

Tip: If quotas have largely remained unchanged from the previous year, then use the Copy Quota Plan option to move quotas from the previous year to the current year.

5. In the North America Sales territory, select a territory quota formula and other options such as the adjustment threshold.

Prerequisites

1. Define a calendar to be used by Sales. 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. Create and activate a territory hierarchy. Consider setting up territories with no coverage if you have no use case for territories but would still like to save quotas in the system for sales reporting. Each salesperson eligible to receive a quota must be assigned to an active territory.
3. Territory metrics are enabled and have values. This is a prerequisite to using territory quota formulas to calculate quota.

Creating a Spread Formula

This spread formula calculates the ratio of closed bookings among the child territories, and applies the ratios to the quota amount a sales manager wants to spread among the child territories.

1. Go to the Manage Spread Formulas page.
2. Click Create to add a new spread formula.
3. In the new row, enter information for the fields, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Closed Revenue</td>
</tr>
<tr>
<td>Description</td>
<td>Spreads the source based on the ratio of closed revenue for the selected year.</td>
</tr>
</tbody>
</table>
Creating a Seasonality Factor Group

1. Go to the Manage Seasonality Factor Groups page and create a new group for summer products for the new year.
2. In the Seasonality Factors region, enter the factor percentages for time periods, as shown in this table:

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Factor Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quarter 1</td>
<td>15</td>
</tr>
<tr>
<td>Quarter 2</td>
<td>40</td>
</tr>
<tr>
<td>April</td>
<td>5</td>
</tr>
<tr>
<td>May</td>
<td>15</td>
</tr>
<tr>
<td>June</td>
<td>20</td>
</tr>
<tr>
<td>Quarter 3</td>
<td>35</td>
</tr>
<tr>
<td>Quarter 4</td>
<td>10</td>
</tr>
</tbody>
</table>

3. Click Save.

Creating a Quota Plan

1. In the Manage Sales Quota Plans page, click Create.
2. 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>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Fiscal Year 2015 Sales Plan</td>
</tr>
<tr>
<td>Description</td>
<td>Corporate Sales Quota Plan for Fiscal Year 2015</td>
</tr>
<tr>
<td>Year</td>
<td>2015</td>
</tr>
<tr>
<td>Calculate Default Territory Quota</td>
<td>Select. If selected, the application calculates the quotas for each of the territories using the default territory quota formula.</td>
</tr>
<tr>
<td>Track</td>
<td>Deselect. Only one plan can track quotas for the year.</td>
</tr>
</tbody>
</table>
3. In the Details region, on the Options tab, enter the options as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjustment Threshold</td>
<td>10</td>
</tr>
<tr>
<td>Territory Quota Formulas</td>
<td>Scale a measure from a past period by x percent. Use 5% and select the prior year, 2014.</td>
</tr>
<tr>
<td>Seasonality Factor Group</td>
<td>Summer</td>
</tr>
</tbody>
</table>

4. In the Sales Quota Territory Options table on the Options tab, expand the Global territory and enter the options as shown in the table for the North America Sales territory.

<table>
<thead>
<tr>
<th>Column</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow Quota Edit</td>
<td>Select</td>
</tr>
<tr>
<td>Adjustment Threshold (%)</td>
<td>8</td>
</tr>
<tr>
<td>Territory Quota Formulas</td>
<td>x percent growth of a measure over a 3 year simple moving average</td>
</tr>
<tr>
<td></td>
<td>a. 3 percent</td>
</tr>
<tr>
<td></td>
<td>b. Prior year 2014</td>
</tr>
<tr>
<td></td>
<td>c. Closed Detail Revenue by Close Date measure</td>
</tr>
</tbody>
</table>

5. Select Track for the quota plan.
6. Click the Activate button and set the activation to right now to test. Upon activation, sales managers can go into the system to begin allocating quotas to their teams.
7. Click Save.

Related Topics
- Territory Coverage: Explained

Enabling Quota Copy: Explained

When you copy territory quota to resource quota, period quotas for the territory also get copied to resource period quotas, if enabled. You can also enable copying both territory and period quotas to resource quotas automatically during publishing. You can set the following profile options using the Manage Administrator Profile Options task in the Setup and Maintenance work area. This task is part of the Sales offering in the Sales Foundation functional area.

Enable Territory Quota Period Copy

When set to yes, users can copy territory quota period amounts to owner resource quota periods. The copy overwrites any existing resource period quotas. The annual resource quota amount must be zero, or the period quotas won't be copied to resource quota periods. Period copy applies to the following actions:
- Copy Territory Quota in the Edit Sales Quotas page
- Copy Territory Quota in the Manage Sales Quotas page
• Copy Child Territory Quota in the Manage Sales Quotas page
• Publish territory quota, if the Enable Automatic Territory Quota Copy to Owner Quota on Publish profile option is also enabled

Enable Automatic Territory Quota Copy to Owner Quota on Publish

When set to yes, territory quota annual values are copied to owner quotas for the sales revenue goal when users publish territory quotas. You can also set the Enable Territory Quota Period Copy to yes. Then the territory quota period amounts are also automatically copied to owner resource quota periods during the publish process.

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.

Quota Validation: Explained

Administrators can turn off the quota validation that occurs when sales managers publish quotas. The validation prevents assigning quotas prior to resource start dates (the same as employee hire dates) or territory quota start dates.

If an employee joins the company or a new territory is created midyear, then managers can’t assign quotas for all of the year periods with validation turned on. To turn off validation, set the following profile option to no: Allow quota start date validation during publish.
Adding Reports to Sales Quota Pages: Procedure

You can create reports using Answers or Business Intelligence and add them to quota pages. Your reports appear in the Quota Analytics tab of the Managing Sales Quotas page or Edit Sales Quotas page. You can select the report from the list of reports on the page.

To add a report to your page:

1. Create your Answers or Business Intelligence Publisher reports for quotas.
2. In the Setup and Maintenance work area, use the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Activity Standard Lookups
3. Go to the lookup type ORA_MOT_MSQ_REPORT for the Manage Sales Quotas page, or ORA_MOT_ESQ_REPORT for the Edit Sales Quotas page.
4. Add a new lookup code for each new report to be added on the page. For example, to add a second report to the Manage Sales Quota page, add the lookup code MOT_QM_MSQ_REPORT2. To add a report to the Edit Sales Quota page the lookup code would be MOT_QM_ESQ_REPORT3. For each additional report to embed in the page, increment the number used in the lookup code.
5. In the Meaning field, enter the report name, for example Quotas by Salesperson Report. The name does not need to match with the report name in the Business Intelligence catalog.
6. In the Description field, enter the report absolute path, for example /shared/Sales/Analytic Library/Embedded Content/Sales Quota Management/MyBIPReport.xdo. To find the absolute path:
   - For Answers reports, find the absolute path in the properties of the report.
   - For BI Publisher reports, click the Copy Resource button to find the absolute path to the report.
7. Set the display sequence. This determines the order of the reports shown in the Analytics tab. The report lookup code with the lowest display sequence number determines the report that is displayed by default.

What happens when a sales quota plan is activated?

When you activate a sales quota plan the status of the plan is changed to completed when the plan year ends. You cannot make changes to a completed quota plan.

When you activate a quota plan a process carries out the activation. Another process runs when the quota plan year end date is reached, or if it has passed at the time of activation. The second process changes the status of the sales quota plan to Completed. You cannot edit a completed sales quota plan.

What happens if I select Calculate Default Territory Quota?

Your selection of Calculate Default Territory Quota causes the application to compute the quotas for each of the territories when the sales quota plan is activated. The computations use the formula and parameters you selected to be the default in Manage Territory Quota Formulas.
What's seasonality?

Annual quotas are distributed to shorter time periods, factoring in seasonal expectations in sales. This expectation is represented as a percentage factor, which reflects the share of quota for the season, or time period.

For example, your sales are typically higher the last quarter of the year and at their lowest the first quarter of the year for several of your product lines. You create the following seasonality factor group, named Retail, to automatically distribute your annual quota and factor in the seasons:

- 10 percent for the first quarter
- 25 percent for the second quarter
- 25 percent for the third quarter
- 40 percent for the fourth quarter

When you assign quota to territories that include these product lines, you apply the Retail seasonality group to correctly distribute the annual quota amounts.

What's the difference between territory and resource quota start and end dates?

Territory quota start date and end date define a period within which the sales quota target must be achieved. The territory quota dates must fall within the start and end dates of the quota plan, and usually match the sales quota plan start and end dates, unless a territory is created after the start of a sales quota plan or deleted during the course of a sales quota plan.

The resource quota start and end dates define a period within which the quota must be achieved by the salesperson, and usually match the sales quota plan start and end dates.

Resource dates vary from the sales quota plan start and end dates when:

- A territory is deleted. All resource quotas within the territory have the same end date as the territory end date. The sales quota plan end date is not yet reached.
- A territory resource is removed from a territory, and the resource is end dated.
- Quota is assigned to a future dated resource who will join the organization in future.

Who is a territory administrator?

Sales managers often choose a salesperson or sales operations resource to assist with the quota setting and territory maintenance for the manager’s branch of the territory hierarchy. Select the Administrator check box for a territory team member in your territory. Now that person can view your territory and modify all territories lower in your territory hierarchy. She can also assign sales quotas for you.

You must add the Territory Management Administration Duty to a security job role assigned to the resource in order for the Administrator selection to take effect. A user with the Sales Administrator security role can modify all territories and set all quotas.
How can I add period quotas prior to the resource start date or territory quota start date?

Your administrator can turn off the date validation that occurs when you publish quotas using the profile option named Allow quota start date validation during publish. The employee hire date is the same as the resource start date.

How can I publish quotas for a territory hierarchy?

As a sales administrator, you can bulk publish quotas by using the Publish action in the Publish or Revise Hierarchy Quotas process. Select the sales quota plan and the territory number that is at the top of the hierarchy for which you want to publish the quotas. The process publishes every territory within the hierarchy.

What's a territory proposal conflict?

You added to your sales quota plan more than one territory proposal, and both update the same territory. If the proposals make identical changes to the same territory, then there is no conflict. Differences in territory definitions that affect quotas are conflicts and appear if you selected Show conflicts only. For example, if for the same territory one proposal is eligible for quota and the other is not, then there is a conflict.

How can I set quotas to the Pending Revision status for a territory hierarchy?

After sales managers publish quotas, they cannot revise them unless the status is changed to Pending Revision. As a sales administrator, you can schedule the Publish or Revise Hierarchy Quotas process, and choose the Revise action. Select the sales quota plan and the territory number for the top of the hierarchy you want to revise. The process changes the status for every territory within the hierarchy to Pending Revision.

Quota Assignment

Quota Allocation, Publishing, and Revision: Explained

When sales managers complete assigning quotas to their directs, they publish the quotas to the owners and resources of their child territories. Child territory owners can then view their quotas for the territories they own. And in turn they assign and publish quotas to the owners and resources of their child territories. Publishing your quotas also sends notifications containing resource quota information to an incentive compensation analyst. The territory owner and the manager of the sales manager who published the quota receive notifications that the quotas are published.
Quota Allocation
You can allocate quotas in the Manage Sales Quotas page. Sales administrators can enter and edit territory and owner quotas for any territory quotas that aren’t published. Sales managers can enter and edit child quotas that aren’t published. For territory quotas that aren’t published, you can also:

- Enter or edit a quota for each period
- Apply seasonality factors

Select a parent territory and click Details to use the Edit Sales Quotas page to enter or edit quotas. You can enter annual quotas, period quotas, and apply seasonality to any quotas not published.

Quota Publishing
When you finish allocating your quota, you publish the quotas to make them available to your directs. After publishing, you can’t make changes to the quotas.

You can select one or more territories to publish. If you click Publish Child Territories, then the selected territories and their children are published. A sales administrator can publish a hierarchy of territories from the Actions menu. When you publish a territory, you publish the following, and the data becomes available for Business Intelligence:

- Territory quota
- Resource quotas for all sales goals for the selected territory
- Quotas assigned to finer time periods

If you did not apply seasonality to quotas, then the publishing process applies the seasonality factor that was defined in the sales quota plan for the territory. If there are no seasonality factor groups defined, then seasonality factors are not applied and there is no granular time period quota. Excluded territories can’t be published. Publishing fails if the selected territory or any territory resource has no quota.

Tip: Save time entering period quotas. Seasonality gets applied automatically on publish if you haven’t manually entered period quotas.

Copying Territory Quotas to Resource Quotas
By setting two profile options, the administrator enables the automatic copying of quotas during publishing. Publishing does the following:

- Copies the territory owner’s annual quota for the sales revenue goal to the owner’s resource quota.
- If the owner’s annual resource quota is zero, then publishing copies the territory period quotas to resource period quotas. It overwrites any existing resource period quotas.

Quota Revision
Before you can revise published quotas, you must change the quota status to Pending Revision. The Revise action changes the status for your selected territory and its children. You can then revise territory quotas, and add, revise, or end date resource quotas. When you complete your revisions you can again publish the quotas and send notifications. The territory quotas change to Published status and resource quotas change to Submitted status.

When you revise quotas, the revised values are not available in Business Intelligence until you republish the revised quotas.
What's a sales quota publish-by date?

The publish-by date is an indication to the territory owner that sales quotas need to be published by a certain date. The date when the owner publishes the quota is the published date.

Resource Quota and Incentive Compensation: How They Work Together

Compensation plans control how an employee is paid. Salespeople often get paid according to their performance. One tool used to measure performance is the establishment of a sales quota for the salesperson and then the comparison of actual sales for a time period with the salesperson's quota for that time period. The application notifies the compensation analyst any time quota is published or changed.
This figure shows the sales manager publishing territory resource quotas. The publication sends a notification to the incentive compensation analyst.

Managing Quotas

At the beginning of the year, sales management update their territory definitions and assign salespeople to territories. Senior managers assign quotas to their territories and child territories. The owners of those territories in turn assign quotas to the owners and resources of their child territories. When a manager publishes quotas, the quotas become available to the owners of the child territories. Also, a notification goes to the compensation analyst with the now published quota information.

During a quota plan period, changes occur in territory definitions, resource assignment to territories, and to quota assignments to resources (salespeople). Managers can choose to submit updated quota information to the compensation analyst in the form of a notification.
Sales Goals

A sales goal determines how quota is measured and defines what you want to measure. The sales goal used for a territory owner’s revenue quotas is the Revenue Sales Goal. In order to assign multiple quotas to an individual salesperson or to assign quotas to salespeople other than territory owners, you must use a sales goal other than the Revenue Sales Goal. Following are some examples of sales goal definitions:

- Number of customer visits
- Number of service contracts sold

Notifications to compensation include quotas for each quota-carrying resource for all sales goals. For each salesperson, the notification contains all the annual resource quotas for all applicable goals as well as the period quotas.

Updating Compensation Plans

The compensation analyst creates compensation plans for a specific time period. The analyst uses quota notifications to keep the quota information in the plan correct and up to date. The analyst analyzes the provided information, performs any other research needed, and manually updates the quota plan or rejects the notification. The compensation plan quota status is set to complete when the compensation analyst completes updating the compensation plan.

Sales Quotas Export and Import: Overview

Within a selected quota plan in Manage Sales Quotas, you can select a territory hierarchy within your control and export resource quotas and territory quotas to CSV files. During the quota planning cycle, sales operations users consolidate quota information for the territories that they support and import the new quota allocations.

From the territory quota table in Manage Sales Quotas, go to the Actions list and select Export or Import. You can import data only to quota plans that are active and being tracked.

Territory quotas, territory period quotas, resource quotas, and resource period quotas are exported and imported using the following four CSV files:

- Territory_Quota.csv
  The file includes the territory name, parent territory, and territory quota.
- Territory_Period_Quota.csv
  The file includes the quota by period (for example, month) for each territory quota.
- Resource_Quota.csv
  The file contains the resource quota per sales goal, and related compensation plan notification status.
- Resource_Period_Quota.csv
  The file includes the quota by period (for example, month) for each resource quota.

One or more CSV files must be in a compressed file to be imported.
Incentive Compensation
You can export resource quotas and resource period quotas to send to incentive compensation for importing performance goals.

1. Navigate to Territories and Quotas.
2. In the Tasks pane, click Manage Sales Quotas.
3. Select an active sales quota plan.
4. Select the territory that you want to export. The export includes all descendants of the selected territory and all resources for each territory.
5. From the Actions menu, select Export, then Export Sales Quotas.
6. From the Actions menu, select Export, then View Export Status.
   The page lists past exports and the status of your export.
7. When the process succeeds and you see your export compressed file in the list.
8. Click the compressed file link and save the file.
9. Click OK.

Using Export and Import to Modify Sales Quotas: Procedure
You can export sales quotas, make additions and changes, and import your quota information to the active sales quota plan.

Prerequisites
You need the following prerequisites:

- You must have an active sales quota plan. Your sales administrator creates sales quota plans. You don't need existing quotas to export. The export provides the CSV files you use for importing quotas.
- You must have a duty role that is mapped to the ORA_ZBS_SALES_ADMINISTRATOR_JOB privilege.

Exporting Quotas
Export quotas for a selected territory and its descendants.

1. Navigate to Territories and Quotas.
2. In the Tasks pane, click Manage Sales Quotas.
3. Select an active sales quota plan.
4. Select the territory that you want to export. The export includes all descendants of the selected territory.
5. From the Actions menu, select Export, then Export Sales Quotas.
6. From the Actions menu, select Export, then View Export Status.
   The page lists past exports and the status of your export.
7. Click Refresh until the process succeeds and you see your export compressed file in the list.
8. Click the compressed file link and save the file.
9. Click OK.

Modifying Sales Quota Data
Use your spreadsheet program to add, change, and delete quota information to the CSV files used for quota import. You can modify any one file or all four files.

1. Extract the files contained in the compressed file.
The four files are:

- Territory_Quota.csv
  The file includes the territory name, parent territory, and territory quota.
- Territory_Period_Quota.csv
  The file includes the quota by period (for example, month) for each territory quota.
- Resource_Quota.csv
  The file contains the resource quota per sales goal, and related compensation plan notification status.
- Resource_Period_Quota.csv
  The file includes the quota by period (for example, month) for each resource quota.

2. Open your CSV files in a spreadsheet program. You can open Territory Quota and Resource Quota files directly. But you must import the Territory Period Quota and Resource Period Quota files to Excel to retain the original date format for the start date and end date fields.
   a. Open a new spreadsheet.
   b. From the Data menu, select Get External Data From Text.
   c. Select the CSV file.
   d. Click Import.
   e. Select Delimited and click Next.
   f. Select Comma, deselect any other delimiters, and click Next.
   g. In the Data Preview region, scroll to the Period Name column and select it.
   h. Under Column data format select Text.
   i. Click Finish.

The period name should appear in your spreadsheet as hyphenated text, for example 12-20. If you open the file without using import, Excel converts this name to a date, which causes an error when you import the file.

3. Update the files with your additions or changes. Because you are able to add or delete resources in the Resource Quota tab of the Edit Sales Quotas UI, the Resource Quota file contains the Action column. In this column, enter ADD, UPDATE, or DELETE to each row you change.

4. Save your CSV files.

⚠️ Caution: Don’t change the names of the CSV files.

5. Compress your modified CSV files together, or compress a single file if you modified only one. You can use any name for the compressed file.

Importing Quotas

You can import any one of the CSV files, up to all four files. No matter how many files you want to import, they must be in a compressed file. You don’t need to select a territory when you import, but security applies during the import. For example, you can’t make changes to quotas for territories you can’t access.

1. Go to Manage Sales Quotas.
2. In the Edit Sales Quotas region, click the Actions menu.
3. Select Import, then Import Sales Quotas.
4. Browse and select the compressed file that contains your updated files.
5. Click OK to submit the file.
6. Click OK to close the information message.
7. From the Actions menu, select **Import**, then **View Import Status**.
8. Click **Refresh** to update the status until the process completes.
9. If you see a rejected data file, click the link to save the reject compressed file.
10. Extract the CSV files from the rejected compressed file.
    The files contain data that could not be imported.
11. Open each CSV file and correct the data.
12. Compress one or more files and reimport the compressed file.
13. To see your imported data in Manage Sales Quotas, refresh your screen by navigating away from it and then back.

What's a variance?

The variance is the difference between the adjusted quota amount for the parent territory and the rolled up total amount from the child territory quotas. The variance can be spread, meaning it gets added to the child territories.

What's an adjustment?

An adjustment is the amount that territory owners, or sales managers who have child territories, add to the territory quota assigned to the territory they own. The territory owner can then allocate the adjusted territory quota to child territories.

Quota Import References

Territory Quota Import File Reference

The following table lists the columns included in the Territory Quota file along with descriptions. Territory Quota and Allocation Comments fields will be updated from the file. The rest of the required fields are used for validation.

<table>
<thead>
<tr>
<th>Import Field Name</th>
<th>Description</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>QuotaPlanName</td>
<td>The sales quota plan containing the territory quota. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>ParentTerritoryName</td>
<td>The name of the parent territory for the territory that is assigned the quota.</td>
<td>No</td>
</tr>
<tr>
<td>TerritoryNumber</td>
<td>External territory identifier. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>TerritoryName</td>
<td>Name of the territory.</td>
<td>No</td>
</tr>
<tr>
<td>StartDate</td>
<td>The start date of the quota period in MM/DD/YY date format.</td>
<td>No</td>
</tr>
<tr>
<td>EndDate</td>
<td>The end date of the quota period in MM/DD/YY date format.</td>
<td>No</td>
</tr>
</tbody>
</table>
### Territory Period Quota Import File Reference

The following table lists the columns included in the Territory Period Quota file along with descriptions. The Territory Period Quota field will be updated from the file. The rest of the required fields are used for validation.

<table>
<thead>
<tr>
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<th>Description</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>QuotaPlanName</td>
<td>The sales quota plan containing the territory quota. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>ParentTerritoryName</td>
<td>The name of the parent territory for the territory that is assigned the quota.</td>
<td>No</td>
</tr>
<tr>
<td>TerritoryNumber</td>
<td>External territory identifier. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>TerritoryName</td>
<td>Name of the territory.</td>
<td>No</td>
</tr>
<tr>
<td>PeriodName</td>
<td>Name of the period from GL_PERIODS. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>StartDate</td>
<td>The start date of the quota period.</td>
<td>No</td>
</tr>
<tr>
<td>EndDate</td>
<td>The end date of the quota period.</td>
<td>No</td>
</tr>
<tr>
<td>TerritoryPeriodQuota</td>
<td>Quota assigned to specific period.</td>
<td>No</td>
</tr>
</tbody>
</table>

### Resource Quota Import File Reference

The following table lists the columns included in the Resource Quota file along with descriptions. Resource Quota and Allocation Comments fields will be updated from the file. The rest of the required fields are used for validation.
<table>
<thead>
<tr>
<th>Import Field Name</th>
<th>Description</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Action Code: Allowed values are INSERT, UPDATE, and DELETE.</td>
<td>No</td>
</tr>
<tr>
<td>QuotaPlanName</td>
<td>The sales quota plan containing the territory quota. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>ParentTerritoryName</td>
<td>The name of the parent territory for the territory that is assigned the quota.</td>
<td>No</td>
</tr>
<tr>
<td>TerritoryNumber</td>
<td>External territory identifier. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>TerritoryName</td>
<td>Name of the territory.</td>
<td>No</td>
</tr>
<tr>
<td>ResourceName</td>
<td>Salesperson's name.</td>
<td>No</td>
</tr>
<tr>
<td>ResourceEmail</td>
<td>Salesperson's e-mail address. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>GoalNumber</td>
<td>Sales goal number. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>GoalName</td>
<td>Sales goal assigned to resource quota.</td>
<td>No</td>
</tr>
<tr>
<td>Currency</td>
<td>CRM corporate currency.</td>
<td>No</td>
</tr>
<tr>
<td>ResourceQuota</td>
<td>Quota assigned to salesperson and associated with specific sales goal.</td>
<td>No</td>
</tr>
<tr>
<td>UnitOfMeasure</td>
<td>Resource quota UOM: Quantity or Amount.</td>
<td>No</td>
</tr>
<tr>
<td>StartDate</td>
<td>Resource quota start date.</td>
<td>No</td>
</tr>
<tr>
<td>EndDate</td>
<td>Resource quota end date.</td>
<td>No</td>
</tr>
<tr>
<td>AllocationComments</td>
<td>Comments about the resource quota allocation.</td>
<td>No</td>
</tr>
<tr>
<td>CompensationPlanStatus</td>
<td>The status of quota being incorporated into the salesperson's compensation plan.</td>
<td>No</td>
</tr>
<tr>
<td>CompensationPlanSubmittedDate</td>
<td>The date that the quota was submitted to the compensation analyst in order for the compensation plan to be updated.</td>
<td>No</td>
</tr>
</tbody>
</table>
Resource Period Quota Import File Reference

The following table lists the columns included in the Resource Period Quota file along with descriptions. The Resource Period Quota field will be updated from the file. The rest of the required fields are used for validation.

<table>
<thead>
<tr>
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<th>Description</th>
<th>Required</th>
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</thead>
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<td>The sales quota plan containing the resource quota. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>ParentTerritoryName</td>
<td>The name of the parent territory for the territory that is assigned the quota.</td>
<td>No</td>
</tr>
<tr>
<td>TerritoryNumber</td>
<td>External territory identifier. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>TerritoryName</td>
<td>Name of the territory.</td>
<td>No</td>
</tr>
<tr>
<td>ResourceName</td>
<td>Salesperson's name.</td>
<td>No</td>
</tr>
<tr>
<td>ResourceEmail</td>
<td>Salesperson's e-mail address. Mandatory attribute and acts as a Unique User Key.</td>
<td>Yes</td>
</tr>
<tr>
<td>GoalNumber</td>
<td>Sales goal number. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>GoalName</td>
<td>Sales goal assigned to resource quota.</td>
<td>No</td>
</tr>
<tr>
<td>PeriodName</td>
<td>Name of the period from GL_PERIODS. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>StartDate</td>
<td>Start date of the period.</td>
<td>No</td>
</tr>
<tr>
<td>EndDate</td>
<td>End date of the period.</td>
<td>No</td>
</tr>
<tr>
<td>ResourcePeriodQuota</td>
<td>Resource Quota assigned to specific period.</td>
<td>No</td>
</tr>
<tr>
<td>UnitOfMeasure</td>
<td>Resource quota UOM: Quantity or Amount.</td>
<td>No</td>
</tr>
<tr>
<td>Currency</td>
<td>CRM corporate currency.</td>
<td>No</td>
</tr>
<tr>
<td>AllocationComments</td>
<td>Comments about the resource quota allocation.</td>
<td>No</td>
</tr>
</tbody>
</table>
27 Setting Up Social Networking

Setting Up Social Networking: Overview

Social networking features in sales let users:

- View activity streams on dashboards.
- Follow the daily activities of people.
- Participate in conversations on social network walls.
- Review and publish files.
- See group space components, such as discussions, blogs, and wikis.

Within a sales application, Oracle Social Network, and Oracle WebCenter Spaces work together to provide the functionality.

Enabling Access to Oracle Social Network

To enable users access to social components provided by Oracle Social Network, you must enable the relevant business objects, such as opportunities and leads.

You use the Manage Oracle Social Network Objects task list in Setup and Maintenance to enable the business objects and the attributes of those business objects. You can also decide whether new objects are automatically shared in Oracle Social Network or whether they must be manually shared.

Note: Do not enable objects while you are in a sandbox.

This chapter contains the information needed to enable Oracle Social Network components in sales application, as well as some setups for Activity Streams and Oracle WebCenter Spaces. For information, refer to the Using Sales guide. For information about implementing and using the Oracle WebCenter social components, refer to the Oracle Fusion Middleware WebCenter documentation available on Oracle Technology Network (http://www.oracle.com/technetwork/middleware/webcenter).

Enabling Objects for Oracle Social Network

You can integrate a number of sales objects with Oracle Social Networking, including support for:

- Company-defined fields on delivered objects.
- Sharing company-defined objects with Oracle Social Network.

You can enable entire objects or only certain attributes. When an object is enabled, you can set it to either Automatic or Manual setting.

- Automatic sharing means that the social object in Oracle Social Network that corresponds to the sales business object is created automatically when the object record is created.
- Manual sharing means that the sales social object is not created automatically when the object record is created. The record must be explicitly shared with Oracle Sales Network by a user in the sales application.

A dialog box displays where you can specify whether to set the object as Automatic or Manual, or turn off the sharing entirely.
Initial Tasks for Social Networking

Setting Up Conversations in Sales Applications

Oracle Social Network provides conversations functionality in sales applications. To enable conversations that are associated with a sales business object record, such as an opportunity, you enable the object in the Setup and Maintenance work area.

Enabling Sharing

Sales personnel want to be able to share information about sales records, such as an opportunity, with colleagues. Before this can happen, an administrator must enable the object for Oracle Social Network. Once the object is enabled, team members can then enable individual records for conversations.

You can configure whether or not to allow the sharing of all the information in a record or only certain attributes. You can also specify whether records aren’t shared automatically and must be manually marked for sharing.

The following procedure uses the opportunity object as the example business object to enable.

1. Sign in with your Sales Administrator credentials.
2. From the Setup list, select Sales.
3. From the list of functional areas, select Sales Foundation.
4. Search for and select the Manage Oracle Social Network Objects task.
   The Manage Oracle Social Network Objects page appears.
5. In the list, open the Opportunity Management item and select Opportunity.
6. Click Enable Object.
7. Specify whether you want users to manually integrate each new business object record with Oracle Social Network or have them shared automatically:
   - Automatic sharing means that the social object in Oracle Social Network that corresponds to the sales business object is created automatically when the object record is created.
   - Manual sharing means that the sales social object is not created automatically when the object record is created. The record must be explicitly shared to Oracle Social Network by a user in sales
8. Click OK on the <business object>: Enable Object dialog box.
9. Notice that the Opportunity row now includes a Warning icon in the Status column. You must enable attributes for the object. See the section, Enabling Opportunity Object Attributes, in this topic.
10. Click Save.
11. In the Confirmation window, click OK.

The following tables lists the most relevant sharable objects and the groupings where they’re located. You cannot share information on some of these objects unless you implement functionality.

<table>
<thead>
<tr>
<th>Object</th>
<th>Grouping</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity</td>
<td>Application Common Components</td>
</tr>
<tr>
<td>Account</td>
<td>Trading Community Model</td>
</tr>
<tr>
<td>Compensation Plan</td>
<td>Incentive Compensation</td>
</tr>
</tbody>
</table>
Enabling Opportunity Object Attributes

To enable the attributes, do the following:

1. In the Attributes region of the Manage Oracle Social Network Objects page, ensure that the Opportunity object is selected. Click the Add icon.

2. A list of attributes for Opportunity is displayed. The sales manager doesn’t want the Level of Risk and Strategic Value attributes enabled, so select the Enabled check box at the top to enable all the attributes, then scroll down and deselect the Level of Risk and Strategic Value check boxes so they won't be enabled.

3. Click OK.

   Notice that a green check mark now appears in the Opportunity object’s Status column.

4. Click Save.

   A dialog box appears, showing your progress. When the process is complete, a confirmation displays.

5. Click OK.

Validating Your Changes

To verify that you enabled opportunity for sharing on Oracle Social Network navigate to an opportunity record to see whether the opportunity displays the Social tab.
Part 1 Integration

Enabling Social Networking for Partners: Explained

With Oracle Social Network enabled, channel organizations and partners can use the social network to collaborate. Channel organizations can invite their partners to sales conversations. As well, channel managers and other deal registration approvers can start conversations with a partner from the deal registration they are reviewing.

Enabling Oracle Social Network for Partners

If you have the Oracle Social Network Service Administrator role, use these steps to enable Oracle Social Network for partner users.

1. Sign in with your Sales Administrator credentials.
2. From the Setup list, select Sales.
3. From the list of functional areas, select Sales Foundation.
4. Search for and select the Manage Oracle Social Network Objects task.
5. In the list of business objects, scroll down and expand Partner Management.
6. Select Partner and click Enable Object.
7. On the Enable Object pop-up window, select Manual and click OK.
8. In the Attributes region, click the Add icon, select the partner attributes you want to pass on to Oracle Social Network, and click OK.
9. Click Save.

Channel account managers can now invite partners to participate in conversations.

Enabling Oracle Social Network for Deal Registrations

Sales administrators can use these steps to enable the Social subtab on Deal Registration pages based on user role, and select which deal registration attributes appear in the Conversation header.

1. Sign in with your Sales Administrator credentials.
2. From the Setup list, select Sales.
3. From the list of functional areas, select Sales Foundation.
4. Search for and select the Manage Oracle Social Network Objects task.
5. In the list of business objects, scroll down, expand Lead Management, and select Deal Registration.
6. Click Enable Object, and in the Enable Object pop-up, select how you want to enable the integration between deal registrations and the Oracle Social Network, and click OK.
7. In the Deal Registration Attributes area, click the Add icon, select the Enabled check box for each deal registration attribute you want to appear in the Conversation header, and click OK.
8. On the Manage Oracle Social Network Objects page, click Save.

WebCenter Components
Setting Up WebCenter Spaces: Points to Consider

When setting up Oracle WebCenter Spaces (also known as "group spaces"), you need to be aware of the several setup requirements and options.

Access to Space Components

End users need certain permissions to enable or view group space components, such as discussions and wikis, for the following objects:

- **Opportunities**: Access is controlled by an opportunity team member with Full access.
- **Competitors and reference customers**: Typically, a user with the Sales Administrator job role enables competitor and reference customer group space components. This job role includes the required Manage Sales Competitor and Manage Sales Reference functional privileges.

Salespeople and sales managers with View access to an object can view group space components.

Embedding Space Components

For a sales object with embedding enabled, the edit view provides an additional check box to show existing embedded discussions and wikis. Users with Full access can activate the check box to embed discussions and wikis for that object record. Only users with Full access to opportunities, and sales administrators for competitors and references, can see and interact with this check box. It is not visible to other users.

You can allow end users to embed discussions and wikis into business object pages by using the following profile options:

- `<Object> Group Space Enabled`: Determines whether a particular object, such as an opportunity, has support for embedded components. Example: Opportunity Group Space Enabled.
- `<Object> Group Space Template Default`: Sets the group space template to use if the object has embedded support (if the value for the profile option above is Y). The available features in a group space depend on the template that was selected when the group space was created. Example: Opportunity Group Space Template Default.

Synchronizing Social Objects

Synchronize Business Objects: Explained

Use Synchronize on the Manage Oracle Social Network Objects page to synchronize business objects. This resends the definitions of business objects having the enablement option as **Manual** or **Automatic** to Oracle Social Network.

Use the Synchronize button at the:

- **Business Objects table level**: To resend the definitions of a selected business object to social network. This button is enabled only when you select a row for a business object with the enablement option as **Manual** or **Automatic**.
- **Manage Oracle Social Network Objects page level**: To resend the definitions of all business objects with the enablement option as **Manual** or **Automatic** to social network.
Note: If you had modified any business object enabled for social network and not saved your changes, then on clicking Synchronize, a warning message appears. This message informs you that you have not saved your changes, and you can select one of the following options:

- **Save and Synchronize**: To save the modified business objects, and synchronize the unmodified business objects.
- **Synchronize**: To ignore any unsaved business objects, and only synchronize the unmodified business objects.
- **Cancel**: To cancel the synchronization task.

When do I synchronize business objects?

Run the Synchronize process after you use configuration sets to import the setup from the Manage Oracle Social Network Objects page in another environment.

You can also run the process whenever you want to synchronize the settings of business objects with social network without making changes in the Manage Oracle Social Network Objects page.

*Related Topics*

- Using Configuration Migration to Move Configurations: Points to Consider

What happens if I synchronize business objects?

When you synchronize business objects, you resend the definitions of business objects having the enablement option as **Manual** or **Automatic** to Oracle Social Network.
28 Setting Up Mobile Applications

Setting Up Mobile Applications: Overview

Oracle Applications Cloud offers the following mobile applications that integrate with the sales applications:

- Oracle CX Cloud Mobile
- Oracle Sales Cloud Mobile
- Oracle Mobilytics

This chapter outlines the capabilities of these applications, and provides installation and setup information.

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
What are the supported platforms for Oracle CX Cloud Mobile?

See the System Requirements for Oracle Applications Cloud at: http://www.oracle.com/us/products/system-requirements/overview/index.html

Initial Tasks for CX Cloud Mobile

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.

2. 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 Sales Object’s Analytics Sub 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_MOBILEVOICE 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?

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.

### 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.

Data Security: Explained

Data downloaded onto your smartphone by the application is stored encrypted. To further protect the stored data, the offline mode is available only after you have successfully signed in to the application.

Oracle CX Cloud Mobile Profile Options: Explained

The following table lists the Profile Options that you can use to configure Oracle CX Cloud Mobile:

<table>
<thead>
<tr>
<th>Profile Option Name</th>
<th>Profile Option Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZMS_DISABLE_OSCM</td>
<td>Specify whether you want to configure Oracle CX Enterprise Mobile in Application Composer (by selecting ENABLED), or configure Oracle Sales Cloud Mobile (by selecting DISABLED).</td>
</tr>
<tr>
<td>ZMS_DISABLE_EMA_CLIENT_ACCESS</td>
<td>Specify whether Oracle CX Cloud Mobile has access to Oracle Sales Cloud data.</td>
</tr>
<tr>
<td>ZMS_MOBILE_VOICE</td>
<td>Enable or disable the mobile voice feature.</td>
</tr>
<tr>
<td>ZMS_LOG_CALLS</td>
<td>Specify whether calls and emails from Oracle Sales Cloud Mobile are logged automatically, or require user confirmation before they are logged.</td>
</tr>
<tr>
<td>ZMS_MOBILECALENDAR_SYNC</td>
<td>Enable synchronization of the calendar with smartphone calendar applications.</td>
</tr>
<tr>
<td>ZMS_MOBILECONTACTSYNC</td>
<td>Enable synchronization of contacts with smartphone contact applications.</td>
</tr>
<tr>
<td>ZMS_SAVE_LOGINPASSWORD</td>
<td>Enable saving of the login password on the mobile device for a more automated sign in.</td>
</tr>
</tbody>
</table>

How can I disable access to sales cloud data from the Oracle CX Cloud Mobile application?
Open the ZMS_DISABLE_EMA_CLIENT_ACCESS Profile Option and set the value to DISABLED to disable access to Oracle Sales Cloud data from Oracle CX Cloud Mobile.

How can I enable the voice feature?
Open the ZMS_MOBILE_VOICE Profile Option and set the value to ENABLED.

Can I set up a user prompt to log an interaction as a call report?
Yes. You can set up a prompt to log an interaction as a call report after a user receives a phone call, email, text message, or attends a meeting. Open the ZMS_LOG_CALLS profile option and set the value to CONFIRM. Alternatively, if you want to log all interactions automatically, set the profile option value to AUTOMATIC.
How can I enable or disable the option to save sign in passwords?
Open the ZMS_SAVE_LOGIN_PASSWORD Profile Option and set the value to **ENABLED** to enable the password saving option, or set the value to **DISABLED** to disable it.

Setting up the Maps Feature: Procedure
There are certain scheduled processes that need to be run to enable the maps feature in the application. This procedure shows you which processes you need to run and the order you need to run them in.

1. Sign in to Oracle Sales Cloud as a user with an Application Implementation Consultant role.
2. Enable geocoding for a country by following the steps in the Setting Up Geocoding topic, found in the Geographies for HCM chapter in the Implementing Global Human Resources guide.
3. Navigate to the Scheduled Processes work area and click **Schedule New Process**.
4. Click the Name drop-down button, search for the Populate Location Latitude and Longitude Information process, and then click **OK**. This process populates the latitude and longitude information for every sales object apart from leads.
5. Enter the parameters, such as the start date and end date, and schedule the job to run automatically at specified intervals.
6. Click **Submit**.
7. Carry out steps 3 to 5 again, this time searching for the Populate Lead Latitude and Longitude Information process. This process populates the latitude and longitude information for leads.
8. Click **Submit**.

Related Topics
- Setting Up Geocoding: Procedure

Offline Mode

Offline Mode: Overview
The offline mode in the CX Cloud Mobile application enables you to view, create, and edit records even when you don’t have access to a cellular (mobile) or Wi-Fi network. This topic gives background information about how the offline mode works.

The stages of the offline mode can be separated as follows:

1. Data is downloaded
2. Offline message is displayed
3. Offline updates are saved
4. Offline data is synchronized

Data is Downloaded
While you are using the application online, up to two different subsets of data are downloaded for offline use:

1. Data that you view in the application.
2. Data for standard and custom objects where the administrator has enabled the Auto Fetch feature. Auto Fetch downloads a subset of an object’s records (including its related child records) for offline use, using the object’s default saved search to determine the data subset. You can specify which objects are included by navigating to the Mobile Application Setup page in Application Composer, selecting **Settings** in the main menu, and enabling the **Auto Fetch** option for the relevant objects.
Note: Auto Fetch only downloads child records that are standard objects. Child records that are custom objects will not be downloaded.

Up to 50 MB of offline data can be stored on your device by default. This is usually sufficient for typical usage, however if you find that this isn’t enough then you can increase the storage in increments of 100 MB, up to a maximum of 500 MB. To change the storage amount, tap **Settings** within the application, and then set the **Offline Storage Amount**.

The data that is downloaded is stored until the time specified in the **Auto Clear Cache** field in Application Composer; after this time the local data will be erased and fresh subsets of data are downloaded when you use the application online. To configure the Auto Clear Cache time period, navigate to the Mobile Application Setup page in Application Composer, select **Settings**, then select an Auto Clear Cache option.

**Offline Message is Displayed**
If your network connectivity is lost while you are using the application, a message is displayed at the top of the page to indicate that you are working offline. You can either dismiss this message for each offline session, or you can stop the message from displaying by navigating to the Mobile Application Setup page in Application Composer, selecting **Settings** in the main menu, and in the Offline Mode section disable the **Offline Notification** option.

**Offline Updates are Saved**
When you are working offline, you can see all of the data that was saved onto the device while you were online. You can also create new records - or update existing records - which will then be synchronized to the server when you are back online.

When you view records that have been created or updated offline, you will see a visual indicator on the page indicating that the record will be synchronized to the server when you are back online. If you want to view all of the records that will be updated when the application is back online, then you can navigate to the pending sync queue by tapping **Pending Sync** in the main menu.

**Offline Data is Synchronized**
Once the network connection is restored, the records that are pending synchronization are synced to Oracle Sales Cloud in the order that the transactions were made offline. If a transaction fails to sync, for example due to a validation error, the corresponding error message is displayed against the record in the **Pending Sync** queue. Once you have resolved the issue, you can sync the record manually.

Note: If the application detects a data conflict, then the changes made in CX Cloud Mobile will override any changes made in the Oracle Sales Cloud application.

**Configuring the Offline Settings: Explained**
Using Application Composer, you can configure Oracle CX Cloud Mobile’s offline settings, such as whether the offline data synchronization is automatic or manual. You can also select which sales objects’ records are available offline.

To configure the general offline settings, navigate to the Mobile Application Setup page in Application Composer, and select **Settings** to configure the following offline options:

- **Enable Offline Mode**: Enables or disables the offline mode.
- **Enable Offline Create and Edit**: Enables or disables the creating and editing of data offline.
- **Auto Sync**: Determines whether the application automatically synchronizes offline updates from CX Cloud Mobile to Oracle Sales Cloud when a network connection is detected.
• **Disable Deferred Create and Edit**: Determines whether the application creates and edits transactions asynchronously. If this setting is disabled, then transactions are synchronized asynchronously from the application to Oracle Cloud.

• **Manual Sync**: Determines whether the manual synchronization synchronizes updates from CX Cloud Mobile to Oracle Sales Cloud and back to CX Cloud Mobile (2-Way), or just from CX Cloud Mobile to Oracle Sales Cloud (1-Way).

• **Maximum Number of Retries**: Determines the maximum number of times CX Cloud Mobile will try to apply offline updates to Oracle Sales Cloud.

• **Online Data Fetch Policy**: Defines how the application uses the local data on the phone, as well as the server data, when there is network connection. The **Local** option enables the application to only display data stored on the phone. The **Remote** option enables the application to only display the data from the server. The **Both** option enables the application to display the local data primarily and then query the server in the background for remote data that has changed. The changed data is then displayed rather than the local data.

• **Auto Clear Cache**: Defines the maximum duration that data is stored on a user’s phone, after which the data is removed from the phone.

You can also configure the data that is available offline. By default, all of the data that you view in the application when you are online is downloaded for offline use. In addition to this data, you can also enable the Auto Fetch feature for standard and custom sales objects, which will download a subset of records (including the related child records) for each object that has the feature enabled. The application uses the default saved search for the Auto Fetch enabled object as the criteria for the data subset.

**Note**: Auto Fetch only downloads child records that are standard objects. Child records that are custom objects will not be downloaded.

To enable the Auto Fetch feature for an object, follow these steps:

1. Within a sandbox, open Application Composer
2. Click **Mobile Application Setup**
3. Click **Home** within the Application Features menu
4. Within the mobile interface designer, click the object that you want to enable Auto Fetch for.
5. In the Feature Details section, enable the **Enable Auto Fetch** option.
6. Repeat steps 4 and 5 for each object that you want enabled for Auto Fetch.

**How can I allow a user to have access to another user's offline data?**

Use the security console to grant the user who requires access to other users’ offline data the **ZEM_ALLOW_PRIVILEGED_ACCESS** role. This role allows the user to sign in as another user, view the local data on the device, and perform a synchronization of any pending transactions.

**Can I stop data being stored on users' devices?**

Yes. You can disable the offline mode and this will stop records from being downloaded onto users’ devices. Note that disabling the offline mode will mean that you can only access records online.

To disable the offline mode, navigate to the Mobile Application Setup page in Application Composer, and select **Settings** to configure the **Enable Offline Mode** option.

**Does the application use downloaded data in the online mode?**

While you are using the application online, up to two different subsets of data are downloaded to your device (see the [Offline Mode: Overview topic](#) for more details). The downloaded data is used when you are offline, but it is also used when you are online. When you view a record online, the application displays the downloaded record first, so that the record is displayed
more quickly, and then checks the Oracle Sales Cloud server for any updates to the record. If the record has been updated on the server, then the application downloads and displays the latest data.

Downloaded data is also used when you search for a record online. The downloaded data is searched first and then if the record can’t be found you are given an option to search the Oracle Sales Cloud server data.

**Note:** If you have disabled the offline mode then records aren’t downloaded to your device, and they are displayed only when they have been retrieved from the Oracle Sales Cloud server.

When does Oracle CX Cloud Mobile update records with Oracle Sales Cloud updates?
As you browse your data online, CX Cloud Mobile checks whether the records you are viewing have been updated in Oracle Sales Cloud. If the records have changed the application downloads the latest changes and updates the records.

### Social Network Integration

**How can I set up Oracle Social Network for Oracle CX Cloud Mobile?**

You need to enable Oracle Sales Cloud objects - or certain attributes of the objects - for Oracle Social Network (OSN), so that the user can share Oracle Sales Cloud object records to OSN. If an object is enabled for OSN, then your users will see the social tab for the object within Oracle CX Cloud Mobile, which will enable them to share the object to OSN.

For details about enabling Oracle Sales Cloud objects for OSN, and for information about selecting whether the object is manually or automatically shared, see the Setting Up Oracle Social Network chapter in the Getting Started with Your Oracle Sales Cloud Implementation guide.

### Extending CX Cloud Mobile

**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.

Creating a Page Layout for a Feature: Procedure
This procedure shows you how to create a List, Detail, or Edit page layout for an Oracle CX Cloud Mobile feature. Creating your own layout enables you to select the fields your users will see for a feature’s views in CX Cloud Mobile.

💡 Tip: You can also specify which user roles can view a particular layout, create criteria that have to be met to display the layout, add custom objects, and specify which geographical regions can view the layout.

1. Sign in to the Oracle Sales Cloud application as user with a Sales Administrator or Sales Implementor role.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting Application Composer under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, or on the Overview page, click Mobile Application Setup.
5. In the Application Feature pane, click the feature that you want to create a layout for.
6. Select the relevant type of page view, such as the detail or list view.
7. In the Layout pane, lick the Duplicate icon for the Standard layout and enter a layout name.
8. Click OK.
9. Select the Active tick icon if it’s not already ticked.
10. Add fields to the layout by selecting the field in the Available Fields pane, and then move the field onto the mobile interface designer. See the topic called How can I edit a field’s display format in a feature's page layout for information about defining a display format for your fields.
11. You can remove fields by clicking the field you want to delete on the mobile interface designer and then clicking the cross icon.
12. You can move fields by clicking the field and moving it to your preferred location.
13. Click **Save** in the top right hand side of the Application Composer page.
14. Test and publish your new page layouts. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for details about how to check your mobile configurations. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud Extending Sales guide.

**How can I add a field to a feature’s page layout?**

Navigate to the mobile interface designer in Application Composer, select the field in the Available Fields pane, and then move the field onto the mobile interface designer. Click **Save** in the top right hand side of the Application Composer page. See the Creating a Page Layout for a Feature: Procedure topic for more information about creating a page layout.

**How can I delete a field in a feature’s page layout?**

Navigate to the mobile interface designer in Application Composer, select the field you want to delete, and then click the cross icon. Click **Save** in the top right hand side of the Application Composer page. See the Creating a Page Layout for a Feature: Procedure topic for more information about creating a page layout.

**How can I move a field in a feature's page layout?**

Navigate to the mobile interface designer in Application Composer, select the field you want to move, and then click the field and move it to your preferred location. Click **Save** in the top right hand side of the Application Composer page. See the Creating a Page Layout for a Feature: Procedure topic for more information about creating a page layout.

**How can I edit a field's display format in a feature's page layout?**

Navigate to the mobile interface designer in Application Composer, select the field you want to edit, and click the **Edit** pencil icon. Select the display format you want and click **Save** in the top right hand side of the Application Composer page. See the Creating a Page Layout for a Feature: Procedure topic for more information about creating a page layout.

> **Note:** Not all fields can be edited. You can only edit fields that require you to choose a display format.

**How can I hide or display user actions for a feature?**

Navigate to the mobile interface designer in Application Composer, select the feature, then select either the **List** or **Detail** page. Select or create a page layout, tap the action button on the mobile interface designer, and select which actions you want to display or hide using the toggle buttons. Click **Save** in the top right hand side of the Application Composer page. See the Creating a Page Layout for a Feature: Procedure topic for more information about creating a page layout.

**Adding a Role to a Layout: Worked Example**

This example describes how to add a role to an Oracle CX Cloud Mobile 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.

> **Note:** You can’t add a role to a custom feature. Custom features are created when you create a custom object in Application Composer, and they’re selected from the Available Features pane.

In this example, you add a role to an Opportunity Detail layout and display the new layout in the CX Cloud Mobile application.

**Add a Role to a Layout**

1. Sign in to the Oracle Sales Cloud application as user with a Sales Administrator or Sales Implementor role.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting Application Composer under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, or on the Overview page, click Mobile Application Setup.
5. In the Application Feature pane, click the feature that contains the page layout that you want to add roles to. In this example, expand the Opportunities subheader.
6. Select the relevant type of page view, such as the detail or list view. In this example, select the Detail view.
7. In the Layouts pane, select the relevant page layout, or create a new page layout (see the Creating a Page Layout for a Feature: Procedure topic for details about how to create a page layout).
8. In the Assigned Roles pane, select the roles you want to add and click Save.

Test and Publish Your Changes
1. Check that your changes appear in the mobile application. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for details about how to check your mobile configurations.
2. When you are happy with your changes, publish your sandbox to distribute your configurations to all CX Cloud Mobile users. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud - Extending Sales guide.

Related Topics
- Using Sandboxes: Explained

Creating Criteria for a Feature’s Page Layout: Procedure
This procedure shows you how to create criteria for an Oracle CX Cloud Mobile feature’s page layout. Creating criteria enables you 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. For example, if you create criteria for an Opportunity Detail layout as follows: Win probability is Greater than 50%, then any opportunities with a win probability greater than 50% will use your layout in the Detail view.

Note: You can’t create criteria for a feature’s List view.

1. Sign in to the Oracle Sales Cloud application as user with a Sales Administrator or Sales Implementor role.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting Application Composer under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, or on the Overview page, click Mobile Application Setup.
5. In the Application Feature pane, click the feature that contains the page layout that you want to add criteria to.
6. Select the relevant type of page view, such as the detail or list view.
7. In the Layouts pane, select the relevant page layout, or create a new page layout (see the Creating a Page Layout for a Feature: Procedure topic for details about how to create a page layout).
8. In the Advance Criteria pane, click Add.
9. Create your criterion by selecting a field, operator, and then entering the relevant field value.

Note: You can’t select a field value from a list of values, so you will need to type in the value if you would normally select it from a list of values.

10. To add a conditional statement click Add and select AND or OR. Enter the field, operator, and relevant field value.
11. When you have finished creating your criteria for the page layout, click Save in the top right-hand side of the Application Composer page.
12. Test and publish your new page layout criteria. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for details about how to check your mobile configurations. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud Extending Sales guide.
Adding a Custom Object to a Page Layout: Procedure
This procedure shows you how to add a custom object to your Oracle CX Cloud Mobile application. Sales objects are also known as features in CX Cloud Mobile, and when you create a custom Sales object in Application Composer a corresponding feature is also created in CX Cloud Mobile. These features can be found in the Available Features pane in the Mobile Application Setup page.

Here are the steps to add a custom object, or feature, to CX Cloud Mobile:

1. Sign in to the Oracle Sales Cloud application as user with a Sales Administrator or Sales Implementor role.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting Application Composer under the Configuration category in the Navigator menu.
4. Select the Sales application and find the custom object you want to add to CX Cloud Mobile.
5. Expand the object’s menu and click Fields.
6. Select the field you want to add to CX Cloud Mobile.
7. In the Constraints section, enable the Include in Service Payload option.
8. Click Save and Close.
9. Repeat steps 6 to 8 for each field that you want to add to the application.
10. Next, under the Common Setup Menu, click Mobile Application Setup.
11. In the Available Feature pane, click on the custom object (otherwise known as a feature) that you want to add and move it onto the mobile interface designer.
12. Click OK in the information message about the views that will be created.
13. If you want to add custom layouts to the List, Edit, or Detail views, see the Creating a Page Layout for a Feature: Procedure topic for more details.
14. If you want to add fields to the picker, click on the fields you want to add in the Available Fields pane, and move them onto the mobile interface designer.
15. When you have finished adding features, click Save in the top right-hand side of the Application Composer page.
16. Test and publish your new features. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for details about how to check your mobile configurations. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud Extending Sales guide.

How can I hide or display a feature in the navigator menu?
Navigate to the mobile interface designer in Application Composer, click on the feature you want to hide or display in the main menu displayed on the mobile interface designer, and select enable or disable in the Feature Detail pane. Click Save.

Renaming Fields in the Application: Explained
To update field names in Oracle CX Cloud Mobile, you need to update the field’s display label in Application Composer, and then the field name is automatically updated in Oracle CX Cloud Mobile. See the ‘Adding Objects and Fields in Application Composer’ chapter in the Oracle Sales Cloud Extending Sales guide for more information about updating field names in Application Composer.

Configuring an Application Feature’s Related Objects: Procedure
An application feature (such as opportunities and contacts) can have related objects, or items, (such as attachments and Business Intelligence reports) that are displayed as tabs at the bottom of the detail page view. This procedure shows you how to add, remove, and reorder related objects in the detail page view. You will also find out how to specify roles, geographical regions, and criteria conditions to control who can view the related objects.

Adding, Removing, and Reordering Related Objects
You can add, remove, and reorder the related objects that appear in an application feature’s detail page view.

1. Create a new detail page layout for an application feature. For information about how to create a new page layout, refer to the Creating a Page Layout for a Feature: Procedure topic.
2. In the mobile interface designer, click the Related Item button and a list of the related objects is displayed.
3. To add a related object to the detail page, move a related object from the Related Items pane onto the mobile interface designer.
4. To remove a related object, click the related object in the mobile interface designer and click the cross icon. The related object moves to the Related Items pane.
5. To reorder the related objects, click the related object you want to move and move it up or down to the appropriate position.

Specifying Roles, Regions, and Criteria for Related Objects
You can create a set of related objects for a particular role or geographical region, or even for a specified set of criteria. For example, you can create a Business Intelligence reports tab in an opportunity's detail page that only sales managers can view.

**Tip:** You can specify roles, regions, and criteria for any type of page layout in the application, not just for related objects.

1. Follow steps 1 to 5 in the Adding, Removing, and Reordering Related Objects section of this topic to specify the related objects you want to appear.
2. To assign a role for the related objects and page layout, expand the Assigned Roles pane and click the role (or roles) to select them.
3. To specify a set of related objects for a geographical region, expand the Assigned Regions pane and click the region (or regions) to select them.
4. To specify a set of criteria conditions that restrict when the related objects are displayed, follow these steps:
   a. Expand the Advanced Criteria pane and click Add.
   b. Create your criterion by selecting a field, operator, and then entering the relevant field value.
   c. To add a conditional statement click Add and select AND or OR. Enter the field, operator, and relevant field value.

**Note:** You can't select a field value from a list of values, so you will need to type in the value if you would normally select it from the list.

Test and Publish Your Changes
Check that your changes appear in the mobile application. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for details about how to check your mobile configurations.

When you are happy with your changes, publish your sandbox to distribute your configurations to all CX Cloud Mobile users. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud Extending Sales guide.

Assigning Geographical Regions to a Page Layout: Procedure
This procedure shows you how to assign geographical regions to an Oracle CX Cloud Mobile feature’s page layout. Adding regions enables you to restrict a page layout’s availability to users from a selected set of geographical regions. For example, if you add the United States and United Kingdom regions to a page layout, then only users from these countries can view the page layout.

Follow these steps to assign geographical regions to a page layout:

1. Sign in to the Oracle Sales Cloud application as user with a Sales Administrator or Sales Implementor role.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting Application Composer under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, or on the Overview page, click **Mobile Application Setup**.
5. In the Application Features pane, click the feature that contains the page layout that you want to add regions to.
6. Select the relevant type of page view, such as the detail or list view.
7. In the Layouts pane, select the relevant page layout, or create a new page layout (see the Creating a Page Layout for a Feature: Procedure topic for details about how to create a page layout).
8. In the Assigned Regions pane, select the geographical regions by clicking on the region. Select as many regions as you require.
9. When you have finished adding regions, click **Save** in the top right-hand side of the Application Composer page.
10. Test and publish your new features. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for details about how to check your mobile configurations. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud Extending Sales guide.

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**Adding Oracle Business Intelligence Reports to a Feature's Analytics Tab: Procedure**

To view Oracle Business Intelligence Analysis (BI) reports in a feature’s Analytics tab (for example, an Accounts or Contacts Analytics tab), you must first perform some configuration tasks.

1. Sign in to Oracle Sales Cloud as a user that has a Sales Cloud Administrator job role and create, or activate, a sandbox. See the topic about using sandboxes for more information about creating, activating, and publishing sandboxes.
2. Navigate to Application Composer.
3. Select **Mobile Application Setup** under the Common Setup list.
4. In the Application Features pane, click the feature that you want to add the report to.

   **Note:** You can add reports to the following Sales objects only: Account, Opportunity, Contact, Lead, Partner, and Deal Registration.

5. Click **Analytics**.
6. In the Available Reports section, search for the report you want to add to the Sales object’s Analytics tab.

   **Note:** You can view all of your BI reports that you have available in your catalog.

7. Move the report onto the mobile interface designer.
8. Click on the report on the mobile interface designer to see the Report Information, Report Filters, and the Assigned roles sections.
9. In the Report Filters section you can see the filters that have been created for the BI report. To further filter the report, or to enable contextual reporting, click the report in the mobile interface designer, and enter the parameters you want the mobile report to use in the Report Filters section. The parameter values are the attribute names which are available in Application Composer under the standard and custom fields list.

   You can override an BI report parameter value so that only the data relevant to the Sales object you are viewing is displayed. Any attributes (apart from ID and Name) can be used as filters by passing the appropriate parameters. For example, for an Account report you could filter using the `@PartyId` or `@PartyUniqueName` parameters to see report information relevant to the Account you are viewing.

   **Note:** You can only provide parameter values to filters that have already been defined in the original BI report.

10. Click the filter’s check box to make the filter active.
11. In the Assigned Roles section, select the roles that will be able to view the report. If you don’t assign a role then the report will be available to all job roles.
12. Click **Save**.
13. Check that your changes appear in the mobile application. See the Testing Oracle CX Cloud Mobile Configurations Using a Sandbox: Worked Example topic for details about how to check your mobile configurations.
14. When you are happy with your changes, publish your sandbox to distribute your configurations to all CX Cloud Mobile users. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud Extending Sales guide.

Related Topics
- Using Sandboxes: Explained

Adding Direct URLs for Sales Object Pages to Business Intelligence Reports: Procedure

You can add a direct URL for a sales object record - such as an Account or Opportunity detail page - to a Business Intelligence report, so that when you tap on a sales object’s column link within the report the list, detail, or edit page opens automatically in Oracle CX Cloud Mobile. This is particularly useful if, for example, you want to access multiple records directly from a report, such as a report showing opportunities that are being worked on in the current quarter. In this example, you can set up direct URLs to the opportunity records, so that when you tap each opportunity name they open in CX Cloud Mobile, and you can make updates to the opportunity without having to search for it.

There are three parts to setting up a report containing direct URLs:

1. Create a Business Intelligence report
2. Construct the direct URL
3. Use the direct URL to set up an HTML link in your report

Create a Business Intelligence report

First you need to create your Business Intelligence report.

1. From the Navigator in Oracle Sales Cloud, click **Reports and Analytics**.
2. In the Reports and Analytics page, click **Browse Catalog**.
3. In the Catalog page, click **New** and then **Analysis**.
4. Create a report with attributes associated with the sales object you want to report on. For example, if you are creating an opportunity report you could include the following attributes: Opportunity Name, Opportunity ID, Customer Name, and Opportunity Revenue.

> **Note:** The report criteria needs to include an ID, such as Opportunity ID, so that the ID can be used in the direct URL. However, if required, the ID can be hidden so that it isn’t displayed in the report.

For more information about creating Business Intelligence reports, see the Creating and Administering Analytics for Sales guide.

Construct the direct URL

Next, you need to construct the direct URL, so that you can associate this to a column in your report.

1. Find out the host and port information for your Sales Cloud Application. Refer to the ‘Finding Your Company’s Host URL: Worked Example’ topic for more information about determining the host URL.
2. Use the following table to establish the format of the direct URL that you will need to use:

<table>
<thead>
<tr>
<th>View</th>
<th>Direct URL Format</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>List page for an object</td>
<td>oscm://?&lt;host URL&gt;&amp;port=&lt;port number&gt;&amp;useSSL=&lt;true or false&gt;</td>
<td>oscm://?host=fuscdrmc118-fa-ext.us.oracle.com&amp;port=443&amp;useSSL=true&amp;action=list&amp;object=Opportunity</td>
</tr>
<tr>
<td>View</td>
<td>Direct URL Format</td>
<td>Example</td>
</tr>
<tr>
<td>----------------------</td>
<td>----------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Detail page for a record</td>
<td>oscm://?&lt;host URL&gt;&amp;port=&lt;port number&gt;&amp;useSSL=&lt;true or false&gt;&amp;action=Detail&amp;object=&lt;object name&gt;&amp;keyAttribute=&lt;record ID&gt;</td>
<td>oscm://?host=fuscdrmsmc118-fa-ext.us.oracle.com&amp;port=443&amp;useSSL=true&amp;action=Detail&amp;object=CallReport&amp;keyAttribute=300100142941814</td>
</tr>
<tr>
<td>Edit page for a record</td>
<td>oscm://?&lt;host URL&gt;&amp;port=&lt;port number&gt;&amp;useSSL=&lt;true or false&gt;&amp;action=Edit&amp;object=&lt;object name&gt;&amp;keyAttribute=&lt;record ID&gt;</td>
<td>oscm://?host=fuscdrmsmc118-fa-ext.us.oracle.com&amp;port=443&amp;useSSL=true&amp;action=Edit&amp;object=CallReport&amp;keyAttribute=300100142941814</td>
</tr>
</tbody>
</table>

**Note:** The full direct URLs outlined in the table will work either when you are signed in or not signed into CX Cloud Mobile. However, if you are assuming that the user is already signed into CX Cloud Mobile when they tap on the direct URL, you can leave out the following from the direct URL:
- Host URL
- Port number
- SSL status

For example, the full direct URL for an object’s detail page link, to be used when a user isn’t signed into CX Cloud Mobile is this: oscm://?<host URL>&port=<port number>&useSSL=<true or false>&action=Detail&object=<object name>&keyAttribute=<record ID>. If you want to construct a direct URL for when a user is signed in, you could use this direct URL instead: oscm://?action=Detail&object=<object name>&keyAttribute=<record ID>.

1. Construct your direct URL using the formats outlined in the table and make a note of it.

3. Use the direct URL to set up an HTML link in your report

Now you can create a new column in your report containing an HTML link, which navigates to the corresponding record in CX Cloud Mobile.

1. Add a new column to the report that you have created.
2. Click the Settings icon next to the new column name.
3. Click Edit Formula.
4. In the Edit Column Formula page, enter a column heading in the Column Heading field.
5. Enable Contains HTML Markup.
6. Enter the column formula in the Column Formula text box, using the following format: `<a target="_blank" href="<direct URL>">"<object>"."<object ID>"".""<column name>"".""</a>`. Use the direct URL that you created in the 'Construct the direct URL' section.

For example, to create a column formula for a column called 'View on Mobile' which would provide an HTML link to a respective opportunity record, you would create the following column formula: `<a target="_blank" href="oscm://?action=Detail&object=Opportunity&keyAttribute='"Opportunity"."Opportunity ID'"">'"View on Mobile'"."</a>`.

Alternatively, if you would like to create an HTML link for an existing column, that would take you to the record displayed in the column, then you can use the following format: `<a target="_blank" href="<direct URL>"."<object>"."<object ID>".""<column name>"".""</a>.

For example, to create a column formula for an existing column called 'Opportunity Name', which would open the respective opportunity when you tapped on the opportunity
name, you would create the following formula: `<a target="_blank" href="oscm://?action=Detail&object=Opportunity&keyAttribute='||"Opportunity".Opportunity ID'||'">'||"Opportunity".Opportunity Name'||'</a>'

7. Close the Edit Column Formula page and click the Settings icon next to the column name you have created or edited.
8. Click Column Properties and then the Data Format tab.
9. In the Data Format tab, enable Override Default Data Format and select the Treat Text As HTML option, so that the data returned by the column formula will be identified as HTML.

Note: You need to have a Business Intelligence Administrator role to carry out this step

10. Save the report. Run the report to check your results.

Creating Saved Searches: Procedure
This procedure shows you how to create a saved search that you can configure for use in the Oracle CX Cloud application. Use the mobile interface designer within Application Composer to create your mobile specific saved searches.

1. Sign in to the Oracle Sales Cloud application as user with a Sales Administrator or Sales Implementor role.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting Application Composer under the Configuration category in the Navigator menu.
4. Select the Sales application.
5. Under the Common Setup Menu, or on the Overview page, click Mobile Application Setup.
6. In the Application Feature pane, click the feature that you want to create a duplicate Saved Search for.
7. Click Saved Search and click the duplicate icon for one of the existing saved searches.
8. Enter a name for the new Saved Search and click OK.
9. Add fields to the saved search by moving fields from the Available Fields pane onto the mobile interface designer.
10. Add criteria to a field by clicking on the field in the mobile interface designer and enter criteria in the Criteria pane. For example, you can add criteria to a Booking Date field that the date is greater than a set date.
11. If required, you can assign roles to the saved search by selecting roles in the Assigned Roles pane.
12. You can assign default roles to the saved search by selecting roles in the Assigned Default Roles pane.
13. Click Save.

Configuring the Call Report Pages: Explained
You can configure the Call Report pages within Oracle CX Cloud Mobile using Application Composer. Using the mobile interface designer within Application Composer, you can manage the fields on the Call Report detail and edit pages. You can add, remove, and move fields, and edit a field’s display format.

Here’s how to navigate to the Call Report feature, so that you can configure it using the mobile interface designer:

1. Sign in to the Oracle Sales Cloud application as a user with a Sales Administrator role.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting Application Composer under the Configuration category in the Navigator menu.
4. Select the Sales application.
5. Under the Common Setup Menu, or on the Overview page, click Mobile Application Setup.
6. In the Application Feature pane, click the Call Report application feature.
7. Configure the feature using the steps outlined in the Configuring Oracle CX Enterprise Mobile: Explained topic and in the page layout FAQs.
Changing the Search Field for an Object's List Page: Procedure

This procedure shows you how to change the search field that is used in a sales object's List page. By default you can search the List page using the Name field, however you can use Application Composer to change the search field and the operator.

1. Sign in to the Oracle Sales Cloud application as a Sales Administrator.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting Application Composer under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, or on the Overview page, click Mobile Application Setup.
5. In the Application Features pane, click the feature that you want to configure.
6. Select the List view page and then select the Standard layout in the Layout pane.

Note: Although you use the Standard layout to configure the search field, your configurations will apply to all of your List page layouts.
7. In the Search pane, select the Search Field that you would like to use. Then select the Search Operator for the search field.
8. Click Save in the Application Composer page.
9. Test and publish your List page search configurations. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for details about how to check your mobile configurations. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud Extending Sales guide.

Enabling Multiple Status Criteria for the Opportunity Object's Saved Search: Procedure

This procedure shows you how to add multiple status criteria for the Opportunity object's saved search. For example, you can specify that the opportunity status must equal Open or Won.

1. Sign in to the Oracle Sales Cloud application as a Sales Administrator.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting Application Composer under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, or on the Overview page, click Mobile Application Setup.
5. In the Application Features pane, click the Opportunity feature
6. Click Saved Search.
7. In the Layouts section, duplicate the standard saved search.
8. Select the Status field in the mobile interface designer.
9. Within the Criteria section, select all of the relevant opportunity status values for the saved search.
10. Click Save in the Application Composer page.
11. Test and publish your List page search configurations. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for details about how to check your mobile configurations. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud Extending Sales guide.

Creating and Editing Records Asynchronously: Explained

You can create and edit records more quickly in the application if you enable the asynchronous saving of transactions. Complete the following steps to enable this feature.

1. Sign in to the Oracle Sales Cloud application as a Sales Administrator.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting Application Composer under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, or on the Overview page, click Mobile Application Setup.
5. In the Application Features pane, click Settings.
6. Turn off the **Disable Deferred Create and Edit** setting, so that the application can perform create and edit transactions asynchronously.

7. If you want to sync the transactions automatically when you are online, then you need to enable the **Auto Sync** setting. If this setting isn’t enabled then you will need to sync the records manually.

8. Click **Save** in the Application Composer page.

9. Test and publish your configurations. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for details about how to check your mobile configurations. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud Extending Sales guide.

### Tracking Usage: Explained

The Track Usage feature enables you to keep track of how your sales representatives use CX Cloud Mobile - and how often - by gathering anonymous, non-personally identifiable information from the application. When the feature is enabled, you can view charts and graphs that display the following subsets of captured tracking data:

- **By Device**: Usage data split across different devices used to run the application.
- **By Platform**: Usage data split across different mobile Operating Systems used to run the application.
- **By Page Views**: Number of times users accessed various pages of the application.
- **By Action**: Number of times actions such as Create, Update, Delete, and Read were performed across all objects enabled for mobile.
- **By Object**: Number of times that different objects were accessed from the application.
- **By Offline Usage of Object**: Usage data split across online and offline modes, for all objects enabled for mobile.
- **By Offline Usage**: Total of all usage data split across online and offline modes.
- **By Active User Sessions**: Count of all users who signed into the application during the selected particular time period.

The application captures the usage data by logging all user interactions in a local file on the mobile device and tagging the interactions with the appropriate sales cloud entity information. Once a day, the contents of the local file are synced to the server and stored in a database table. The usage data sent from CX Cloud Mobile is zipped and encoded to optimize storage, and to keep the data secure.

> **Note:** The application never tracks any personally identifiable information.

To view the charts and graphs, enable a sandbox and navigate to Application Composer from the main menu. Click **Mobile Application Setup**, and then click the **Usage** tab. Select a time period and geographical region, and scroll the page to view the various reports.

The enable usage tracking, follow the steps in the Enabling Usage Tracking: Procedure topic.

### Related Topics

- Using Sandboxes: Explained

### Enabling Usage Tracking: Procedure

This procedure shows you how to enable the usage tracking feature, which helps you to keep track of how your sales representatives use CX Cloud Mobile - and how often - by gathering anonymous, non-personally identifiable information from the application. For more information about this feature, see the Tracking Usage: Explained topic.

1. Sign in to the Oracle Sales Cloud application as user with a Sales Administrator or Sales Implementor role.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting **Application Composer** under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, or on the Overview page, click **Mobile Application Setup**.
5. In the Application Feature pane, click **Settings**.
6. In the mobile interface designer, scroll down to the **Usage Settings** heading, and enable the **Track Usage** setting. Once the setting is enabled, you can select the countries you want to track.
7. Click **Save** in the Application Composer page.
8. Test and publish your new page layouts. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for details about how to check your mobile configurations. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud Extending Sales guide.

### Adding the Currency Field to Opportunities: Procedure

You can add the currency field to the opportunity create and edit pages, so that either the Oracle Engagement Cloud currency is used for an opportunity’s value, or your sales representatives can select an applicable currency. Opportunity amounts in currencies different to the default Oracle Engagement Cloud currency are converted using applicable exchange rates for business unit reporting.

Follow these steps to add the currency field to the opportunity create and edit pages:

1. Sign in to the Oracle Sales Cloud application as user with a Sales Administrator or Sales Implementor role.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting **Application Composer** under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, or on the Overview page, click **Mobile Application Setup**.
5. In the Application Feature pane, click the Opportunity feature.
6. Click the **Edit** view.
7. In the Layout pane, click the **Duplicate** icon for the Standard layout and enter a layout name.
8. Click **OK**.
9. Select the **Active** tick icon if it’s not already ticked.
10. Select the Currency field in the Available Fields pane, and then move the field onto the mobile interface designer.
11. Select the **lov** display format.
12. Click Save in the Application Composer page.
13. Test the currency field and publish the sandbox when you are happy with the configuration. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for details about how to check your mobile configurations. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud Extending Sales guide.

See the Setting Up Multiple Currencies chapter of the Oracle Sales Cloud Implementing Sales guide for more information about managing currencies in Oracle Engagement Cloud.

### Filtering a Product List by Territory: Procedure

You can restrict the products that sales representative can view and select in leads and opportunities to ones that are available in their territories only. This can be useful, for example, if you don’t want to show products that are available outside of sales representatives’ business unit.

Follow these steps to set territory filtering for CX Cloud Mobile products:

1. Sign in to the Oracle Sales Cloud application as user with a Sales Administrator or Sales Implementor role.
2. In the Setup and Maintenance work area, use the following:
   - Offering: Sales
   - Functional Area: Sales Catalog and Products
   - Task: Manage Product Group Usage
3. Select the **Base** catalog from the **Product Group Usage** table
4. In the **Base: Details** table, select the **Functions** tab.
5. Select the **Territory engine** entry for the Opportunity Management application.
6. Choose a product filtering value, based on the options outlined in the following table:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not run</td>
<td>Territory filtering is off to show all products in the sales catalog.</td>
</tr>
<tr>
<td>Enforce territory</td>
<td>Territory filtering is on to show only products within user’s territory.</td>
</tr>
<tr>
<td>Display choice - checked by default</td>
<td>Not applicable for CX Cloud Mobile. Show all products when this option is selected.</td>
</tr>
<tr>
<td>Display choice - unchecked by default</td>
<td>Not applicable for CX Cloud Mobile. Show all products when this option is selected.</td>
</tr>
</tbody>
</table>

7. Click **Save and Close**.

**Note:**
- All of the sales catalog filtering options are applicable for the Sales Cloud application, but only two options apply to the CX Cloud Mobile application: Do not run and Enforce territory.
- Territory filtering applies offline, so only the products available within the user’s territory will appear.

For more information about filtering the Sales catalog, refer to the Filtering Catalog Display by Territories: Explained topic in the Setting up Sales Catalogs chapter of the Oracle Sales Cloud Implementing Sales guide.

**Related Topics**
- Accessing Tasks to Update Existing Setup Data: Procedure

### Enabling the Entry of Multiple Addresses for Accounts and Contacts: Procedure

Follow this procedure to enable users to enter multiple addresses in the Accounts and Contacts detail and edit pages. By default, you can only add one address for Accounts and Contacts.

1. Sign in to the Oracle Sales Cloud application as user with a Sales Administrator or Sales Implementor role.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting Application Composer under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, or on the Overview page, click Mobile Application Setup.
5. In the Application Feature pane, click the Accounts or Contacts feature.
6. Select either the **Detail** or **Edit** view.
7. In the Layout pane, click the **Duplicate** icon for the Standard layout and enter a layout name.
8. Click **OK**.
9. Select the **Active** tick icon if it’s not already ticked.
10. Find the **Primary Address** field on the mobile interface designer and then click the cross icon to delete the field.
11. Select the **Address** field in the Available Fields pane, and then move the field onto the mobile interface designer. This will enable your users to enter multiple addresses in the feature’s Detail or Edit page.
12. Click **Save** in the Application Composer page.
13. Test your updates and publish the sandbox when you are happy with them. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for details about how to check your mobile configurations. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud Extending Sales guide.
Tip: If you want to restrict the ability to add multiple addresses to certain users, remember to assign roles and criteria to your new page layout. See the Adding a Role to a Layout: Worked Example and Creating Criteria for a Feature’s Page Layout: Procedure topics for more details.

Enabling the Favorite Icon in the Accounts List Page: Procedure
You can enable the favorite icon to appear in the Accounts list page, so that users can swipe right to mark an account as a favorite.

Follow these steps to enable the favorite icon:

1. Sign in to the Oracle Sales Cloud application as user with a Sales Administrator or Sales Implementor role.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting Application Composer under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, or on the Overview page, click Mobile Application Setup.
5. In the Application Feature pane, click the Accounts feature.
6. Click the List view.
7. In the Layout pane, click the Duplicate icon for the Standard layout and enter a layout name.
8. Click OK.
9. Select the Active tick icon if it’s not already ticked.
10. Click the new layout, and on the mobile interface designer, click the favorite circle to either enable (or disable) the favorite icon. The favorite icon is disabled by default.
11. Click Save in the Application Composer page.
12. Test your updates and publish the sandbox when you are happy with the configuration. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for details about how to check your mobile configurations. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud Extending Sales guide.

Enable the Creation of Records from Search Results Pages: Explained
You can enable the creation of new records from search result pages, making it more convenient for users to add and create related records. For example, if you can’t find a contact to add to a new appointment, then you can create a contact from the contact search results page.

Follow these steps to enable the creation of new records from search result page (otherwise known as the 'picker'):

1. Sign in to the Oracle Sales Cloud application as user with a Sales Administrator or Sales Implementor role.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting Application Composer under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, or on the Overview page, click Mobile Application Setup.
5. In the Application Feature pane, select the parent object (otherwise known as parent ‘feature’) that you want to configure. For example, if you want to enable the creation of contacts from other objects' search result pages, then select the Contact object, or feature.
6. Select the Picker view.
7. Click the more icon on the mobile interface designer.
8. Enable the Create <Object Name> option.
9. Click Save in the Application Composer page.
10. Test that you can create a new record from a search result page and publish the sandbox when you are happy with the configuration. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for details about how to check your mobile configurations. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud Extending Sales guide.
Configuring a Close Period for Opportunity Saved Searches: Procedure

You can specify a close period for opportunity saved searches that is different from the CX Cloud Mobile application default, which is set to the current quarter. You can also specify that CX Cloud Mobile uses the close period that is set up in Engagement Cloud.

Follow these steps to configure the close period for opportunity saved searches:

1. Sign in to the Oracle Sales Cloud application as user with a Sales Administrator or Sales Implementor role.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting Application Composer under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, or on the Overview page, click Mobile Application Setup.
5. In the Application Feature pane, click the Opportunity feature.
6. Click the Saved Search view.
7. In the Layout pane, click the Duplicate icon for the most appropriate predefined saved search layout and enter a layout name.
8. Click OK.
9. Select the Active tick icon if it’s not already ticked.
10. Click the Close Period field in the mobile interface designer.
11. In the Criteria pane, select a suitable Close Period value for your saved search. To set the Engagement Cloud close period as the default close period, select the Default Profile Option value.
12. Add or update other criteria as needed for your saved search, including enabling the Default Saved Search option.
13. Click Save in the Application Composer page.
14. Test your configurations and publish the sandbox when you are happy with the configuration. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for details about how to check your mobile configurations.

For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud Extending Sales guide.

Note:

- If you have previously created custom opportunity saved search layouts that have a fixed Close Date field criteria, these will continue to work, however you can’t add new Close Period field criteria to these searches.
- See the Configuring Opportunity Close Period Search: Explained topic for more information about setting up close period values in Engagement Cloud.

Related Topics

- Configuring Opportunity Close Period Search: Explained

Enabling Multiple Business Units for Opportunities: Procedure

You can enable the business unit field for opportunities, so that sales representatives working in multiple business units can associate a business unit to an opportunity. You can also create an opportunity layout for a business unit, so that data entry is simplified for divisional sales processes.

To enable the business unit feature in CX Cloud Mobile, you first need to implement the multiple business unit model for Oracle Sales Cloud. See the Setting Up Multiple Business Units chapter of the Oracle Sales Cloud Implementing Sales guide for more details.

Adding the Business Unit Field to Opportunity Pages

When you have enabled the multiple business unit model in Oracle Sales Cloud, follow these steps to add the business unit field to opportunity pages:

1. Sign in to the Oracle Sales Cloud application as user with a Sales Administrator or Sales Implementor role.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting Application Composer under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, or on the Overview page, click Mobile Application Setup.
5. In the Application Feature pane, click the Opportunity feature.
6. Click either the List, Detail, or Edit page.
7. In the Layout pane, click the Duplicate icon for the Standard layout and enter a layout name.
8. Click OK.
9. Select the Active tick icon if it's not already ticked.
10. Select the Business Unit field in the Available Fields pane, and then move the field onto the mobile interface designer.
11. Click Save in the Application Composer page.
12. Test your updates and publish the sandbox when you are happy with the configuration. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for details about how to check your mobile configurations. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud Extending Sales guide.

Creating Opportunity Layouts for Specified Business Units
Follow these steps to create opportunity layouts for specified business units:

1. Follows steps 1 to 5 in the ‘Adding the Business Unit Field to Opportunity Pages’ section.
2. Click either the Detail or Edit page.
3. In the Layout pane, click the Duplicate icon for the Standard layout and enter a layout name.
4. Click OK.
5. Select the Active tick icon if it's not already ticked.
6. Select relevant fields pertaining to a business unit in the Available Fields pane, including the Business Unit field, and then move the field onto the mobile interface designer.
7. In the Advanced Criteria pane, click Add.
8. Select Business Unit and set a value for the business unit.
9. Repeat these steps for additional business unit layouts.
10. Click Save in the Application Composer page.
11. Test your updates and publish the sandbox when you are happy with the configuration. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for details about how to check your mobile configurations. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud Extending Sales guide.

Enabling Attachments for Custom Objects: Procedure
You can enable attachments for top-level custom objects, so that users can view and add attachments (such as photos, videos, and voice notes) to custom objects.

Follow these steps to enable attachments for custom objects:

1. Sign in to the Oracle Sales Cloud application as user with a Sales Administrator or Sales Implementor role.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting Application Composer under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, or on the Overview page, click Mobile Application Setup.
5. In the Application Feature pane, click the relevant custom object.
6. Click the Detail view.
7. On the mobile interface designer, click one of the Related Items fields.
8. In the Related Items pane, move the Attachments related object onto the mobile interface designer.
9. Click Save in the Application Composer page.
10. Test your updates and publish the sandbox when you are happy with the configuration. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for details about how to check your mobile configurations. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud Extending Sales guide.

**Testing Oracle CX Cloud Mobile Configurations: Worked Example**

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.

**Task Summary**

To test your configurations, complete the following tasks:

1. Download the configurations from the sandbox and verify them.
2. Publish the sandbox

**Download Configurations From the Sandbox**

1. After making your configurations, keep Oracle Sales Cloud open (signed in with a Sales Administrator or Sales Implementor role). Make sure that the sandbox where you made the changes is active in the application.
2. Open CX Cloud Mobile on your mobile device and sign in as a user that will be able to view your configurations. For example, if the changes have been made to a layout with an assigned role, then you’ll need to sign in with a user that has the required role permissions to see the changes.
3. Tap the menu button (on the top left hand side of the page) and tap **Sandbox** to download the configurations from the sandbox.
4. Select the sandbox that contains your configurations and tap **Save**.
5. Check your configurations. When you’re happy with your configurations you need to publish the sandbox.

**Publish the Sandbox**

1. Sign in to Oracle Sales Cloud as the same user you used to make the configurations.
2. Publish your sandbox to distribute your configurations to all Oracle CX Cloud Mobile users. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud - Extending Sales guide.

**Mobile Sales**

**Mobile Sales: 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

What are the Mobile Sales supported platforms?
See the System Requirements for Oracle Applications Cloud at: http://www.oracle.com/us/products/system-requirements/overview/index.html

Initial Tasks for Mobile Sales
Implementing Mobile Sales: Explained
You must implement Oracle Sales Cloud prior to implementing Oracle Sales Cloud Mobile Sales. For more information, see the guide, Oracle Sales Cloud - Getting Started with Your Sales Implementation.

Implementation Overview
Implementing Mobile Sales involves setting profile options and, optionally, configuring the fields and objects that users can view on their mobile devices.

You must set the following profile options:
• Password Save on Phone Enabled: Specifies whether users are allowed to store their login passwords on their mobile devices. Set to Y to allow saving, or N to not allowing saving. Allowing users to save passwords makes it
easy for users to sign in to the mobile application without the need to enter a password each time they access the application.

- **Password Save on Phone Enabled**: Specifies whether users are allowed to store their login passwords on their mobile devices. Set to Y to allow saving, or N to not allowing saving. Allowing users to save passwords makes it easy for users to sign in to the mobile application without the need to enter a password each time they access the application.

**Note**: You can get supplementary information on implementing Mobile Sales in the Roll out Kit for Oracle Sales Cloud Mobile, available on My Oracle Support (1540393.1).

### Configuring Mobile Sales

Mobile Sales is integrated with the same tool used for configuring the Sales Cloud applications, Oracle Application Composer. A five-step process guides you through the process of configuring specific fields and objects that users can manage on their mobile devices. To configure Mobile Sales, sign in to Application Composer and configure Mobile Sales pages.

**Related Topics**
- Oracle Sales Cloud - Getting Started with Your Sales Implementation
- Setting Profile Option Values: Procedure

### Finding the Host URL: 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.

**Related Topics**
- Installing the Oracle Sales Cloud Mobile iPhone Application: Procedure
- Installing the Oracle Sales Cloud Mobile Android Application: Worked Example

### 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.
Additional Configurations for Mobile Sales

How can I disable the synchronization of Calendar entries and Contacts for Oracle Sales Cloud Mobile?
You can disable or enable the Calendar and Contacts synchronization buttons on the sign out page by changing the following Profile Options: Enable Calendar Synchronization and Enable Contact Synchronization. Set the options to either Y (to enable synchronization) or N (to disable synchronization). The default profile option values are set to Y.

Related Topics
- Setting Profile Option Values: Procedure

How can I change the default filter criteria for contacts, customers, and opportunities that are displayed within Oracle Sales Cloud Mobile?
Navigate to the Application Composer, find the Sales object that you want to alter (for example, a Contact or Opportunity), and expand the view of the Sales object. Click on Pages and then the Mobile Pages tab. Edit the Sales object, and select the Configure Filter for List View option that you want to use.

How can I set up the automatic password saving on smartphones and tablets?
Set the Password Save on Phone Enabled profile option to either Y (Yes) or N (no).

Related Topics
- Setting Profile Option Values: Procedure

How can I enable address fields to be selected using lists of values?
Set up geography data and validation in the desktop application, and this will be reflected automatically in the Oracle Sales Cloud Mobile application. Adding geography validation enables users to select their address from selectable address fields, or notify users if required address fields are missing. To find out more about how to set up geography data and validation, refer to the geography reference data setup overview topic.

Related Topics
- Setting Up Geography Validation

Extending Mobile Sales

Mobile Sales Extensibility: Explained
Application Composer lets implementors configure the Oracle Sales Cloud Mobile Sales iPhone, Android and BlackBerry applications. Using Application Composer, implementors can manage which objects and fields are visible on the Oracle Sales Cloud Mobile application without having to carry out specific configurations for a particular device.
Implementors can manage the following for the Oracle Sales Cloud Mobile application:
- Enable standard Oracle Sales Cloud Sales and Common objects that are not enabled by default for smartphones.
- Enable custom Sales and Common objects for smartphones.
• Change the fields (including custom fields) visible on Oracle Sales Cloud Mobile for mobile-enabled Sales and Common objects (standard or custom objects).
• Configure the Sales Cloud Mobile layout based on roles, record type, expression, or any combination thereof.
• Add Business Intelligence reports to the Sales Cloud Mobile application.

Related Topics
• Configuring Oracle Sales Cloud Mobile

Can I set a saved search as the default list criteria for sales objects in Oracle Sales Cloud Mobile?
Yes. If a saved search has been set as the default for an Oracle Sales Cloud object in the main application, then this becomes the default list criteria for the sales object in Oracle Sales Cloud Mobile. For more information about creating saved searches using Page Composer, see the Creating a Saved Search for an Object topic.

Note that hidden saved searches won’t appear in Oracle Sales Cloud Mobile.

How can I enable address fields to be selected using lists of values?
Set up geography data and validation in the desktop application, and this will be reflected automatically in the Oracle Sales Cloud Mobile application. Adding geography validation enables users to select their address from selectable address fields, or notify users if required address fields are missing. To find out more about how to set up geography data and validation, refer to the geography reference data setup overview topic.

Related Topics
• Setting Up Geography Validation

Hiding the Assets Tab in the Accounts, Contacts, and Households Mobile Pages: Worked Example
This example shows you how to hide the Assets tab for Accounts, Contacts, and Households in Oracle Sales Cloud Mobile.

Navigating to the Mobile Pages tab in Application Composer
1. Sign in to Oracle Sales Cloud as a user that has a Sales Cloud Administrator job role and create, or activate, a sandbox. See the topic about using sandboxes for more information about creating, activating, and publishing sandboxes.
2. Navigate to Application Composer and select the Common application.
3. Expand the Standard Object and expand the menu of either the Account, Contact, or Household object.
4. Select Pages and then select the Mobile Pages tab.

Hiding Assets for the Account, Contact, and Household Objects
1. Under the Detail Page Layouts menu in the Mobile Pages tab, click the relevant layout name, and click the Edit icon.
2. In the Related Objects section, select Assets from the Selected Related Objects, and click the arrow to move the Assets object to the Available Related Objects.
3. Click Save and Close.

Checking and Distributing your Configurations
1. After removing the Assets object from your Account, Contact, or Household mobile pages, check that your changes appear in the mobile application. See the Testing Oracle Sales Cloud Mobile Configurations Using a Sandbox: Worked Example topic for details about how to check your configurations in the mobile application.
2. When you are happy with your changes, publish your sandbox to distribute your configurations to all Oracle Sales Cloud Mobile users. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud Extending Sales guide.

**Related Topics**

- Using Sandboxes: Explained

**Testing Mobile Sales Customizations: Worked Example**

Test all of your configurations in a sandbox before publishing them to the main application. Sandboxes are standalone environments where you define and test configurations before deploying the configurations to the production application.

Use Application Composer to configure Oracle Sales Cloud Mobile pages or objects in a sandbox environment, and then view your configurations on your mobile device prior to publishing the changes.

**Opening a Sandbox**

1. Sign in to Oracle Sales Cloud as a user who has a Sales Cloud Administrator job role.
2. In the global header, expand the **Settings and Actions** menu.
3. Select **Manage Sandboxes**, under the Administration subheading.
4. Select the sandbox in which you want to make your configurations.

> **Note:** You might have to make a sandbox active or create a new sandbox.

**Configuring Oracle Sales Cloud Mobile Using the Application Composer**

1. Open the Application Composer by selecting **Application Composer** under the Configuration category in the Navigator menu.
2. Select the parent object that you want to configure.
3. Select the Pages node in the navigation tree.
4. Select the Mobile Pages tab to see the mobile configuration options for the parent and its child objects.
5. Configure the mobile pages as you want.

> **Note:** If you want to configure a layout for a specific role, record type, or expression, you must first duplicate an existing page, configure that page, then specify a role, record type or expression for that page layout.


**Checking Your Configurations in the Oracle Sales Cloud Mobile Application**

1. Sign in to Oracle Sales Cloud application as an Oracle Sales Cloud Mobile user who has a Sales Representative, Sales Manager, or Sales Vice President job role.
2. Select the sandbox that contains your configurations.
3. Keeping the Oracle Sales Cloud browser window open on your laptop or PC, open Oracle Sales Cloud Mobile on your mobile device and sign in using the same user you used to sign in to Oracle Sales Cloud.

> **Note:** Signing in to the Oracle Sales Cloud Mobile application as the same user in step 1 lets you view the sandbox you selected in step 2. If the Oracle Sales Cloud browser window is still open, only you can access the sandbox on the Oracle Sales Cloud Mobile application. All other users can only view the published version of the application.

4. Check the pages that you configured to ensure that they're working as expected.
5. Publish your sandbox to distribute your configurations to all Oracle Sales Cloud Mobile users. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud - Extending Sales guide.

Related Topics
- Sandboxes: Explained
- Using Sandboxes: Explained
- Sandboxes: How They Work with Application Changes and Features

Adding Branding to Mobile Sales: Worked Example
This example shows you how to add your company name, company logo, and select an application theme color for Oracle Sales Cloud Mobile.

Adding a Brand Name
1. Sign in to Oracle Sales Cloud as a user that has a Sales Cloud Administrator job role and create, or activate, a sandbox. See the topic about using sandboxes for more information about creating, activating, and publishing sandboxes.
2. Navigate to Application Composer and select the Sales application.
3. Select Mobile Application Setup, which you can find under the Common Setup menu.
4. Select Configure Application Branding, which you can find under the Branding heading.
5. Add your brand name in the Selected Brand Name field and click Save and Close.

Adding a Company Logo
1. Repeat steps 1 through 4 above.
2. Under the Select Brand Logo heading, select Browse and choose an image.
3. Click Save and Close.

Selecting an Application Theme Color
1. Repeat steps 1 through 4 of the Adding a Brand Name section above.
2. Select an application theme color from the color grid.
3. Click Save and Close.

Checking and Distributing the Configurations
1. After adding your company name, company logo, and/or selecting an application theme color, check that your changes appear in the mobile application. See the Testing Oracle Sales Cloud Mobile Configurations Using a Sandbox: Worked Example topic for details about how to check your configurations in the mobile application.
2. When you are happy with your changes, publish your sandbox to distribute your configurations to all Oracle Sales Cloud Mobile users. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud - Extending Sales guide.

Related Topics
- Using Sandboxes: Explained

Adding a BI Report to Mobile Sales: Procedure
To view Oracle Business Intelligence Analyses reports on mobile applications you must first perform the following configuration tasks from the web application.
1. Navigate to the Application Composer and select the Sales application.
2. Select **Mobile Application Setup** under the Common Setup list.

3. In the Mobile Application Setup page, select **Manage Mobile Reports**.

4. Create the report, entering the Oracle Business Intelligence Analyses report details.

5. Add the report to the Mobile Reports Springboard page, or the Mobile Reports Sales Account page, by selecting either **Configure Mobile Reports: Springboard** or **Configure Mobile Reports: Sales Account**.

Note that you can add Oracle Business Intelligence Analyses reports, but you can’t add Oracle Business Intelligence Publisher reports.

What happens if I configure an Oracle Business Intelligence report that is displayed by Oracle Sales Cloud Mobile?

The configured version of the Oracle Business Intelligence report is displayed on users’ smartphones. Also, any filters that you created for the report reflect the changes you made to the report.

Creating a Mobile Sales Account Contextual Report: Procedure

This procedure shows you how to create an Analysis report that’s filtered by the Customer or Account ID when it is viewed from the Account or Opportunity detail pages.

The Analysis Report can be filtered on any report column that is mapped to the Customer or Account ID, for example Customer.Customer Row ID. You can use any Subject Area, and in our example we will use a report based in the Sales - CRM Customer Overview subject area being run from the Account detail page.

> **Note:** At present it’s not possible to use other IDs, such as Opportunity ID. So if the report is run from the context of the Opportunity Detail page, it must be filtered by the Customer or Account ID. This means that opportunities must be linked to a customer or account in order for them to be displayed.

1. From the Home page, navigate to Reports and Analytics.

2. Click the **Browse Catalog** icon.

3. In the Oracle Business Intelligence Catalog page, click **New** and then **Analysis**.

   > **Note:** Analysis reports are the only reports supported for Sales Cloud Mobile.

4. Select a Subject Area. For our example we are using the Sales - CRM Customer Overview subject area.

5. Double click on the column names in the Subject Areas pane to add them to your report. In our example we select Name, Country Code, and Customer Row ID from the Customer folder.

6. In the Filters section, select the filter icon and add an **is prompted** filter on a field that contains the Account or Customer ID. In our example we select the Customer Row ID column.

7. Make a note of the column formula by editing the filter you have just added and selecting the **Edit Formula** icon. For our example, the value is Customer.Customer Row ID.

8. Save the report.

9. Once the report is saved, you also need to take a note of the full path name of the report. To find this go back to the Catalog and select the report’s properties. Copy the location address (in our example it’s /users/sales_admin) and the report name (in our example it’s Mobile_Report). Add a forward slash to the end of the location address and append the report name to the location address. In our example, the full path name is: users/sales_admin/Mobile_Report.

10. Navigate back to the web application and open an active sandbox.

11. Navigate to Application Composer and select the Sales application. Under the Common Setup menu item, select **Mobile Application Setup**.

12. Select **Manage Mobile Report**.

13. Create a new mobile report. In the Path field, enter the full path name of the report that you made a note of in step 9.

14. Enter the report parameters as follows:
Report Parameters | Value | Detail
--- | --- | ---
Name | SubjectName. table.Customer Row ID | This is the field that has been defined in the filter. For example, Sales - CRM Customer Overview. Customer. Customer Row ID
Value | #{viewScope. Customerid} | This is used by Sales Mobile to pass the ID of the current customer being viewed on the account or opportunity detail page
Type | filter | Used to build filter query
Data Type | varchar | Used to build filter query
Operator | in | Used to build filter query

15. Click **Save and Close**.
16. Click the Standard Objects menu item and select an Account or Opportunity object. In our example we will select the Sales Accounts object.
17. Click **Pages** and then click **Mobile Pages**.
18. Click **Configure Mobile Reports: (object name)**.
19. Move the newly added report from the Available Reports to the Selected Reports and save the changes.
20. Check the report in the Sales Cloud Mobile application.
21. Publish the sandbox when you’re satisfied with the report.

**Related Topics**
- Creating Analytics with Subject Areas

**Dynamic Choice Lists in Mobile Sales: Explained**
A dynamic choice list field provides a list of values from which your users can select a value at run time. The list of values is considered dynamic because the list is based on a query of a related object’s records. Some dynamic choice list fields are standard, which means they are provided automatically with Oracle Sales Cloud. You can also create user-defined dynamic choice list fields in Application Composer. Both standard and user-defined dynamic choice list fields can be displayed on Oracle Sales Cloud pages, as well as on Oracle Sales Cloud Mobile pages.

Read this topic to learn about the following:
- What are dynamic choice list fields, and why are they useful?
- Adding dynamic choice list fields to Oracle Sales Cloud Mobile pages.
- Creating the related object subtabs in Oracle Sales Cloud Mobile.

**What’s a Dynamic Choice List Field?**
A dynamic choice list is a field that contains a list of values which are populated from the actual data of a related object. At run time, your users can select a value from the field. This selection associates that related object’s value with the primary object’s record that the users are currently looking at.

For example, let’s say your users need to specify an account for an agreement:
- Desired result:
On the Create Agreement or Edit Agreement page, you want your users to select an account from the Account Name field.

- **Steps to enable the desired result:**

  To enable this behind the scenes, use Application Composer to create the Account Name dynamic choice list field on the Agreement object. The Account Name field will be populated with a list of account records from the Account object. Once that field exists on the Agreement object, add the field to all Agreement pages (including Mobile pages).

- **End result:**

  The Account Name field will now be available from the Create Agreement or Edit Agreement pages. The field itself will include a list of actual account names, populated from the Account object.

### Why are Dynamic Choice List Fields Useful?

Dynamic choice list fields are useful because they display at run time with a prepopulated list of values, which your users can pick from. But, dynamic choice lists fields are also very useful because, behind the scenes, they enable a one-to-many relationship between the source object and target object.

This means that not only do you get the ability to associate a source object record (using our previous example, an account) to a target object record (an agreement) using the dynamic choice list field. But, you can also add a related object subtab to the source object’s details page (the Account details page), showing a list of all the target object records (agreements) that are associated with a single source object record (account).

In our previous example of making a list of accounts available for association with an agreement, the relationship that is created between the Account and Agreement objects is a one-to-many relationship, where one account can be associated with multiple agreements. Behind the scenes, an account identifier is stored in the Agreement object’s table.

Once the dynamic choice list field is created, the one-to-many relationship that is automatically created means that you can now use Application Composer to display an Agreements subtab on the Account details page. This subtab lists all the agreements that are related to an account. Having this ability to add subtabs is a nice benefit; in a single view, your end users can see all the agreements that are related to a single account. Creating subtabs based on an existing dynamic choice list field is discussed below.

### Adding Dynamic Choice List Fields to Oracle Sales Cloud Mobile Pages

You can add standard and user-defined dynamic choice list fields to your Oracle Sales Cloud Mobile pages. Adding dynamic choice list fields to Mobile pages requires three steps:

1. Configure the Mobile picker page for the source object that populates the dynamic choice list field.
2. Create a dynamic choice list field based on that same object.
3. Add the field to your Mobile pages.

Let’s review each step in depth:

1. Configure the Mobile picker page, also known as a search and select page, for the source object that populates the dynamic choice list field. This is a required, one-time configuration task per object. If you don’t configure the picker page, then you won’t be able to display that object’s dynamic choice list fields on any Mobile UI. This configuration is required for both standard objects as well as custom objects.
Note: Some exceptions exist.
- For example, the Account object is delivered with the picker page already configured for your use, so you don't have to configure a picker for the Account object.
- Some other standard objects don't support the Mobile picker page. In this case, if standard dynamic choice list fields exist based on those objects, then you won't be able to add those fields to Mobile UIs.

To configure the picker page for standard and custom objects (except Account):

a. Navigate to Application Composer.
b. Under the Objects navigation tree, expand the tree structure for your object.
c. Click the Pages node.
d. Click the Mobile Pages tab.
e. In the Picker region, click the Create Mobile Picker link for your object.
f. On the Configure Mobile Picker page, select the fields that you want to display in the picker page. For example, let's say this is the picker page where your users will search for a contact. In addition to the contact name, you might also want to display the contact city in the picker page. At run time, your users will be able to decide between Mary Smith from New York, or Mary Smith from Los Angeles.
g. Click Save and Close.

2. After the Mobile picker page is created for an object, you can now create any dynamic choice list field based on that same object. See: "Dynamic Choice Lists: Explained".

3. Once your dynamic choice list field is created, you can now add the field to your Mobile pages. See: "Configuring Oracle Sales Cloud Mobile".

Tip: If your dynamic choice list field is not available to add to a Mobile UI, then confirm that the Mobile picker page was created for the dynamic choice list field's source object. See Step 1 above.

Note: Navigating to a sales object's details page after selecting the sales object from a DCL field is not supported currently.

Adding Subtabs to Oracle Sales Cloud Mobile Pages

After you create a one-to-many relationship between objects using a dynamic choice list field, you can then expose the "many" object's records on a subtab that is displayed on the "one" object's details page. You do this by creating a related object subtab in Application Composer.

Note: You can display a custom object subtab on a custom object Mobile details page. You can also display a custom object subtab on a standard object Mobile details page. Displaying a standard object subtab on a custom object Mobile details page, however, is not supported.

Adding a subtab to Mobile pages requires four steps:

1. Create and configure the Mobile relationships list for the related object.
2. Configure the picker page for the related object.
3. Indicate if you want your end users to be able to create new records and add existing records, directly from the subtab.
4. Finally, add the subtab to the Mobile details page layout or layouts where you want the subtab to appear.
Let’s review each step in depth:

1. Create and configure the Mobile relationships list for the related object. This is where you create the table format that displays on the subtab.
   a. Navigate to Application Composer.
   b. Under the Objects navigation tree, expand the tree structure for your object.
   c. Click the Pages node.
   d. Click the Mobile Pages tab.
   e. In the Related Objects region, view the list of objects that are available to add as subtabs to your object’s details page.

      Click the Create Mobile Page link for your related object. The Create Mobile Page link is enabled if the related object’s top level Mobile pages are already created.

   f. On the Create or Edit List Layout page, use the List View region to indicate which related object fields you want to appear on the subtab.

2. Configure the picker page for the related object. If you enable your end users to add one or more existing records to the subtab at run time, then they will access this picker page.

   a. On the Create or Edit List Layout page, use the Picker: Select many region to indicate which related object fields you want to appear on the picker page for the related object.

3. Indicate if you want your end users to be able to create new records and add existing records, directly from the subtab.

   a. On the Create or Edit List Layout page, check Show Add and Show Create to enable those actions on the subtab.

   b. Click Save and Close.

4. Finally, add the subtab to the Mobile details page layout or layouts where you want the subtab to appear.

   a. Back on the Mobile Pages tab, navigate to the Detail Page Layouts region.

   b. Duplicate the standard layout to create a new layout to edit, or edit another existing layout.

   c. In the Related Objects region, view the list of related objects that are available to add as subtabs to your object’s details page. In the Available Related Objects list, your subtab displays using the one-to-many relationship name that was automatically created when you first created the dynamic choice list field. To display your subtab on the Mobile details page, move that subtab to the Selected Related Objects list.

   d. Click Save and Close.

Related Topics

- Configuring Oracle Sales Cloud Mobile
- Dynamic Choice Lists: Explained
- Object Relationships: Explained
- Configuring a Search and Select Dialog Box: Explained

Can I delete the custom fields I have created for the Around Me feature?
Yes. If you created custom fields for the Around Me feature for earlier releases, then you don’t have to maintain the fields with geocodes because the application no longer uses them.
## Setting Up Office 365

### Oracle Sales Cloud for Office 365: Overview

Use Oracle Sales Cloud for Office 365 to maximize productivity by accessing your sales application data, such as emails and appointments, from within Office 365.

The following table describes the key features.

<table>
<thead>
<tr>
<th>Features</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access contextual your sales application information within Office 365.</td>
<td>View records, top connections, and activities associated with a contact.</td>
</tr>
<tr>
<td>Share Office 365 emails with your sales application.</td>
<td>Save your Office 365 emails in your sales application as activities and associate them with accounts, leads, or opportunities.</td>
</tr>
<tr>
<td>View the top connections of contacts in the side panel.</td>
<td>Leverage your organization’s resources that interact the most with a contact to gain better insight into the contact.</td>
</tr>
<tr>
<td>Create and follow-up with contacts and activities in the side panel.</td>
<td>Create and edit contacts from the side panel. You can also view activities’ history and create activities such as appointments, tasks, and calls.</td>
</tr>
<tr>
<td>Synchronize data between your sales application and Office 365.</td>
<td>Synchronize contacts, appointments, and tasks between your sales application and Office 365 to have a continuously updated and accurate 360-degree view.</td>
</tr>
</tbody>
</table>

### Signing in and Signing out

To use the side panel, sign in using your cloud service credentials.

Ensure that your browser’s compatibility view setting is disabled before you load the side panel.

The first time you log in to the side panel, you must authorize the link between your sales application user and your Office 365 account. Subsequently, no other sales application user can access the side panel using the same Office 365 account.

> **Note:** If you enter a set of your cloud service credentials that is associated with a different Office 365 account, you must clear the browser cache before signing in again.

### Related Topics

- Oracle Sales Cloud for Office 365 Side Panel: Explained
Installing Oracle Sales Cloud for Office 365: Procedure

As an administrator, you install and manage the Oracle Sales Cloud for Office 365 add-in for a single user or a group of users. This topic explains how you can create and install the add-in through the Office 365 portal.

The installation includes these steps:

1. Create the add-in in Microsoft Azure Active Directory (AD).
   a. Create the application for Oracle Sales Cloud for Office 365 add-in.
   b. Configure the application.
2. Deploy the add-in.
   a. Upload the add-in manifest file in the Microsoft Exchange Admin console.
   b. Set the deployment option.
      The options are: Optional (enabled by default), Optional (disabled by default), and Mandatory (always enabled).
3. Update the Client ID, Client Secret, and Server Address using RESTful web services or enter the Application ID and Application Key on the Manage Office 365 Task page.

Usage Agreement

This Oracle-Microsoft integration or plug-in may enable You to link to or transmit Your Content or Third Party Content to, or otherwise access, or retrieve content from, Microsoft and its platforms, users, or services. Oracle does not control and is not responsible for Microsoft sites or platforms or services, the performance or availability of the services, or any content received or sent. You bear any and all risks associated with access to and use of Microsoft sites, platforms, and services and are solely responsible for entering into and compliance with separate terms between you and Microsoft. Oracle is not responsible for the security, protection or confidentiality of such content (including obligations in the Hosting and Delivery Policies and Data Processing Agreement and Oracle’s Privacy Policy) that is transmitted to such Microsoft sites or platforms or services. You are solely responsible for obtaining or having any required consents or other legal basis for your use of this integration or plug-in. Oracle reserves the rights to terminate your connection or integration if your use of this integration or plug-in violates the terms of your Agreement(s) with Oracle.

Creating the Add-In

To create the add-in:

2. Click Admin on the home page.
   The Admin center page appears.
3. Click Azure Active Directory in the Admin centers list.
   The Azure Active Directory admin center page appears.

   \(^\text{Note:}\) If you are a first-time user, then you must sign up for your Microsoft Azure Active Directory.

4. Select All service and then Azure Active Directory.
   The details page corresponding to the active directory appears.
5. Click App registrations.
The Applications list page appears.

a. Click **New application registration**.

   The **Create** dialog box appears.

b. Enter a name for the application, select **Web app/API** as the Application type, and enter the **Sign-on URL**.

   The Sign-on and App ID URLs are the same as your cloud service home page URL.

c. Click **Create** to create the application.

   The application appears on the App registrations page.

6. Select the application to go to the Settings page.

   a. Click **Reply URLs**.

   b. Enter the **Reply URL** and click **Save**.

   Replace main.html with close.html in the existing URL.

c. Click **Keys**.

   The Keys page appears.

d. Enter a key description.

e. Select a duration.

   f. Click **Save**.

   The application generates a value for the key. Keep a note of this value because you will use this as the Client Secret.

g. Close the Keys page.

   h. Click Required permissions to add delegated permissions.

   i. Click Add to go to the Add API access page.

   j. Click Select and API and select **Office 365 Exchange Online**.

   k. Select all the delegated permissions that do not require administrator access.

   **Caution:** Do not select **Read all users' full profiles**.

   l. Click **Done** and close the page to go back to the Settings page.

   m. Click **Properties** to go to the Properties page.

   Keep a note of the Application ID because you will use this as the Client ID.

To update the Client ID and Client Secret, run a REST API POST call either through a REST client or a CURL command. Run the following REST service:

1. Run the RESTful API Get service.

2. Select and make a note of the **Application ID** from the response.

3. Update the **REST API - Patch** request with the **Application ID**.

4. Enter the **Client ID** and **Client Secret**, that you had earlier noted, in the Patch request payload.

5. Run the **REST API - Patch** request with the Application ID you noted.

   The following is an example of a Patch request

   **URL:** https://ucf5-fap0721-fa-ext.oracledemos.com/salesApi/resources/latest/zpsApps/300000154508924

   {
6. Check the server address and ensure that the server is active.

In case the Get request does not return anything, run a POST request to create a record. Set the HTTP method to POST and the content-type header to application/vnd.oracle.adf.resourceitem+json.

The following is an example of a Post request.

```json
URL: https://ucf5-fap0724-fa-ext.oracledemos.com/salesApi/resources/latest/zpsApps
{
  "OscServerAddress": "https://ucf5-fap0724-fa-ext.oracledemos.com",
  "ClientId": "2026aed3-3a81-485e-b352-9e6a8b4c8d5d",
  "ClientSecret": "m9FhEEdWr14vXWUEtpVCzzNowWu4Qkd1MqEdPdhE8AQ=",
  "IsActive": "Y",
  "ProxyServer": "dmz-proxy.oracleads.com",
  "ProxyPort": 80,
  "Version": "latest"
}
```

The equivalent CURL command is:

```
curl --request POST \
--url <host>/salesApi/resources/latest/zpsApps \
--header 'content-type: application/vnd.oracle.adf.resourceitem+json' \
--data '{
  "OscServerAddress": "https://ucf5-fap0724-fa-ext.oracledemos.com",
  "ClientId": "2026aed3-3a81-485e-b352-9e6a8b4c8d5d",
  "ClientSecret": "m9FhEEdWr14vXWUEtpVCzzNowWu4Qkd1MqEdPdhE8AQ=",
  "IsActive": "Y",
  "ProxyServer": "dmz-proxy.oracleads.com",
  "ProxyPort": 80,
  "Version": "latest"
}'
```

Obtaining and Updating the Manifest File

To get the add-in manifest file, to be able to install Oracle Sales Cloud for Office 365, contact Oracle Support.

To update the manifest file, perform the following steps.

1. Ensure that the URLs are the same as the URL you used when setting up the environment. Update the default value of URLs associated with the following tags:
   - IconUrl
   - HighResolutionIconUrl
   - bt:Url

2. Update the ID in the manifest file with the Client ID on the Configure page of the application you created.
3. Update the display name and the default value of the group label with the name of your application.
4. Save the manifest file.
Deploying the Add-in

To deploy the add-in, perform the following steps:

2. Click Admin on the home page.
   
The Admin center page appears.
3. Click Exchange in the Admin centers list.
   
The Exchange admin center page appears.
4. Click add-ins in the organization section.
5. Click the Add icon on the add-ins page, and click Add from file.
   
The add from file dialog box appears.
6. Browse for the manifest file you want to upload, and click Next.

When you upload the manifest file, the User Default option is disabled. To enable the User Default option:

1. Select the file you just uploaded, and click the Edit icon.
2. On the Edit Add-in settings dialog box, select Make this add-in available to users in your organization.
3. Select an option under Specify user defaults.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Optional, enabled by default</td>
<td>The add-in is installed and enabled in Office 365. The user has the option to disable the add-in.</td>
</tr>
<tr>
<td>Option, disabled by default</td>
<td>The add-in is installed and disabled in Office 365. The user has the option to enable the add-in.</td>
</tr>
<tr>
<td>Mandatory, always enabled. Users can’t disable the add-in.</td>
<td>The add-in is installed and enabled in Office 365. The user does not have the option to disable the add-in.</td>
</tr>
</tbody>
</table>

4. Click Save.

All the users that you select under the Provided to option can now view the add-in on their Office 365 account.

Uninstalling the Add-in

You must run a local synchronization (upload only) so that data is not lost.

To uninstall the add-in:

2. Click Admin on the home page.
   
The Admin center page appears.
3. Click Exchange in the Admin centers list.
   
The Exchange admin center page appears.
4. Click add-ins in the organization section.
5. Select the Office 365 add-in, and click the Delete icon.
Sales Application and Office 365 Records: How They Are Synchronized

You can synchronize contacts, appointments, and tasks between your sales application and Office 365 through Scheduled Processes.

Settings That Affect Synchronization

The following settings determine the records that are synchronized between your sales application and Office 365.

- Profile Options
- Synchronization Settings

You can select the types of records you want to synchronize by enabling the corresponding profile option. The profile options are set to No by default.

The following table lists the profile options for each type of record.

<table>
<thead>
<tr>
<th>Profile Option</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZPS_365_ENABLE_CONTACT_SYNC</td>
<td>Select Yes to synchronize contacts between your sales application and Office 365.</td>
</tr>
<tr>
<td>ZPS_365_ENABLE_APPOINTMENT_SYNC</td>
<td>Select Yes to synchronize appointments between your sales application and Office 365.</td>
</tr>
<tr>
<td>ZPS_365_ENABLE_TASK_SYNC</td>
<td>Select Yes to synchronize tasks between your sales application and Office 365.</td>
</tr>
</tbody>
</table>

You can use the following settings to select saved searches that determine what you want to synchronize between your sales application and Office 365.

- Contact Synchronization Settings
- Activity Synchronization Settings

You can select predefined saved searches from the side panel or create your own saved search in the sales application. When you select a saved search, the corresponding records matching the saved search are synchronized with Office 365 when the next synchronization runs.

The following table lists the predefined saved searches options for contacts and activities such as appointments and tasks.

<table>
<thead>
<tr>
<th>Saved Search</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Contacts</td>
<td>All contacts in your sales application.</td>
</tr>
<tr>
<td>My Business Contacts</td>
<td>All contacts belonging to all the accounts you own.</td>
</tr>
</tbody>
</table>
Saved Search | Description
--- | ---
My Contacts | All contacts, of the type account, that you are an owner of.
My Favorite Contacts | All your favorite contacts.
My Open Activities | All appointments that are open and you are a resource for in your sales application.

You can synchronize your Office 365 contacts and tasks that are shared with Oracle.

**How Records Are Synchronized**

When you create, update, or delete records using the side panel, information is updated simultaneously in your sales application and Office 365. However, if you modify records in either your sales application or Office 365, then the changes reflect in the other application only after synchronization.

💡 **Note:** Contacts deleted in your sales application are instantly deleted in Office 365 whereas contacts deleted in Office 365 are deleted in your sales application only after synchronization. However, if synchronized contacts were originally imported into your sales application or created after data merge, then deleting the contact in your sales application does not delete the contact in Office 365. You must manually delete such contacts in Office 365.

**Related Topics**

- Why doesn’t the category of my email show the sales application after I share it
- Configuring Saved Search for Office 365: Explained

**Scheduling Oracle Cloud and Office 365 Synchronization: Procedure**

Use Scheduled Processes to synchronize records between your sales application and Office 365.

You must schedule each of the processes shown in the following table:

<table>
<thead>
<tr>
<th>Process</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Synchronize Oracle Sales Cloud and Office 365</td>
<td>This process synchronizes the Office 365 activities that you share with your sales application through the side panel.</td>
</tr>
<tr>
<td>Synchronize Synchronization Between Oracle Sales Cloud and Office 365</td>
<td>This process synchronizes the contacts and activities between your sales application and Office 365 based on your synchronization settings.</td>
</tr>
<tr>
<td>Refresh Security Tokens of Office 365 Users</td>
<td>This process is mandatory to refresh your login credentials for the scheduled processes to run successfully.</td>
</tr>
<tr>
<td>Process</td>
<td>Description</td>
</tr>
<tr>
<td>---------</td>
<td>-------------</td>
</tr>
</tbody>
</table>

Note: The sub-processes run automatically with the synchronization processes and don’t have to be scheduled separately.

Synchronization takes place based on the frequency that you select for each process. Set the synchronization frequency depending on your data volume.

- For low data volumes: If you expect less than 200 records in your sales application and Office 365 together, set the frequency to ten minutes.
- For high data volumes: For data volumes exceeding 500 records in your sales application and Office 365 together, set a frequency of 30 minutes.

Note: Oracle recommends that you do not set a frequency of less than five minutes. If you synchronize too frequently, then some updates might not be processed.

To schedule a process:

1. Sign in as a sales administrator.
2. Click Scheduled Processes on the Navigator menu.
4. On the Schedule New Process dialog box, select Job as the Type.
5. Click the Name drop-down list and click Search.
6. Search for the process you want to schedule, and click OK.
7. On the Schedule New Process dialog box, click OK.
   The Process Details dialog box appears.
   
   Note: To run a one-time synchronization, click Submit and synchronization occurs immediately.

8. Click Advanced.
10. Select the frequency in which you want the process to run.
11. Select the start and end dates. You must schedule the job again after the end date.
12. Click Submit.

The job is now scheduled and synchronization takes place based on the frequency that you selected.

Record Conflict Resolution: How It Is Processed

Conflicting records occur when there is a difference between information saved in your sales application and the information in the Office 365 side panel. As an administrator, you can set the conflict resolution preference for your users.

Settings that Affect Conflict Resolution

To set the conflict resolution preference, set the profile options shown in the following table:
### How Conflicting Records Are Processed

Sales administrators specify how they want conflicts to be processed through the related profile options. If administrators set up the application to enable users to view and select the option they want, users can view and select options in the Synchronization Settings page.

The three options for conflict resolution are shown in the following table:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Server Wins</td>
<td>The values in your sales application overwrite the values in Office 365 automatically.</td>
</tr>
<tr>
<td>Client Wins</td>
<td>The values in Office 365 overwrite the values in your sales application automatically.</td>
</tr>
<tr>
<td>User Selected</td>
<td>The user is prompted every time a conflict occurs. The Synchronization Status page displays <strong>Successful with Conflicts</strong> as the status along with a list of conflicting records.</td>
</tr>
</tbody>
</table>

### Migrating from Microsoft Outlook to Office 365

**Migrating From Microsoft Outlook to Office 365: Overview**

Oracle offers several products that let you integrate your sales application with Microsoft or Google email and calendar applications. Before finalizing a product, review all your options and choose the product that best addresses your needs. Use Oracle Sales Cloud for Office 365 to maximize productivity by accessing your cloud service data.

**Migrating from Outlook to Office 365: Prerequisites**

Use Oracle Sales Cloud for Office 365 to maximize productivity by accessing your cloud service data. Following are the prerequisites for an efficient and error-free migration from Outlook to Office 365:

- Backup your contacts and activities.
- Run a complete synchronization on your Outlook client.
  - Uninstall Oracle Sales Cloud for Outlook add-in from all the computers.
b. On each computer, start Outlook and click send/receive to synchronize all changes with Exchange server. Ensure that that there is no CRM data in Outlook storage.

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Related Topics
- Outlook Add-in and Exchange Server Migration/Email Server/Provider Change (Doc ID 2322609.1)

Migrating from Outlook to Office 365: Procedure

Depending on your current configuration, perform the appropriate procedure to migrate to Office 365:

<table>
<thead>
<tr>
<th>Current Configuration</th>
<th>Migration Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office 365 Exchange</td>
<td>See the Uninstalling chapter in the Deploying Sales for Outlook guide.</td>
</tr>
<tr>
<td></td>
<td>2. Configure and install the Oracle Sales Cloud for Office 365 add-in.</td>
</tr>
<tr>
<td></td>
<td>See Installing Oracle Sales Cloud for Office 365: Procedure</td>
</tr>
<tr>
<td></td>
<td>3. Run the Oracle Sales Cloud for Office 365 Sync Engine to synchronize contacts,</td>
</tr>
<tr>
<td></td>
<td>appointments, and tasks between your sales application and Office 365.</td>
</tr>
<tr>
<td>Outlook 2016 (Office 365 Exchange)</td>
<td>2. Uninstall your Outlook client.</td>
</tr>
<tr>
<td></td>
<td>See the Uninstalling chapter in the Deploying Sales for Outlook guide.</td>
</tr>
<tr>
<td></td>
<td>3. Install Outlook 2016 (Office 365 Pro Plus)</td>
</tr>
<tr>
<td></td>
<td>4. Configure and install the Oracle Sales Cloud for Office 365 add-in.</td>
</tr>
<tr>
<td></td>
<td>See Installing Oracle Sales Cloud for Office 365: Procedure</td>
</tr>
<tr>
<td></td>
<td>5. Run the Oracle Sales Cloud for Office 365 Sync Engine to synchronize contacts,</td>
</tr>
<tr>
<td></td>
<td>appointments, and tasks between your sales application and Office 365.</td>
</tr>
</tbody>
</table>

Related Topics
- Uninstalling Oracle Sales Cloud for Outlook
- Installing Oracle Sales Cloud for Office 365

FAQs for Migration
How can I prevent duplicate contacts and activities from being created in the new client?

The Oracle Sales for Office 365 add-in checks for duplicate contacts, appointments, and tasks before they are shared with the server. There is no de-duplication process at the Office 365 client. All synchronized data from your sales application are created in the client, as new records during the first synchronization process. Subsequent synchronization processes maintain the server-client links. For synchronizing with your sales application from the client, there are duplication checks for contacts, based on the first name, last name and email address. There is no duplication check logic for appointments and tasks.

What happens if I have not backed up my contacts and activities?

If you have not backed up your contacts and activities, and an unexpected issue occurs, then you may lose your data. It is a best practice to back up your data before the migration process starts.

How can I resolve conflicts?

There is a conflict resolution page in the client, through which you can manage the conflicts.

What happens if migration completes before I uninstall my client?

If Exchange server has been migrated, but the Oracle Sales Cloud for Outlook add-in was not uninstalled, then the following issues can occur:

Case #1

I have uninstalled and re-installed the client after the Exchange migration to make it working with a new email profile.

After re-installing the add-in and starting Outlook, the application detects old configuration with "Data structure collision" message and prompts to remove it. At this point, there are these possible results:

- Successfully removes old data and applies new data structure. No issues occurred.
- Fails to remove previous data. Reinstall the add-in. If reinstalling does not solve the issue, then you must clean the Outlook storage using the MFCMAPI tool. (Log a new Service Request).

Case #2

After re-installing the Oracle Sales Cloud for Office 365 add-in and starting Outlook, the application shows "no data structure collision" message, but old data and custom folders still exist in Outlook storage. New data structure was along with existing data structure.

If you proceed with First Run Assistant, this may lead to numerous duplicates and collisions during first synchronization. To prevent this, you must cancel First Run Assistant and proceed with manual storage cleanup using the MFCMAPI tool. (Log a new Service Request).
Case #3
The following error occurs repeatedly: To correctly apply the Oracle Sales Cloud for Outlook update, Outlook must be restarted. Save your changes, close Outlook, and then start it again.

Related Topics
- Outlook must be restarted - Endless Loop (Doc ID: 2346857.1)
- Outlook Add-in and Exchange Server Migration / Email Server / Provider Change (Doc ID 2322609.1)

What happens to the pre-migrated configurations?
Office 365 does not use any previous configurations from Classic Outlook. You must re-configure Office 365 for your business needs.

What happens to my offline sales application data?
All the offline sales application data created by the Classic Outlook are deleted by the uninstall process. There is no offline data for the new Office 365 client.

How can I categorize a contact in the Outlook Web Application?
In the Outlook Web Application, you cannot categorize a contact.
To synchronize any contact from Office 365 to your sales application, you must tag the contact with the Oracle Sales Cloud category. Then synchronize the contact using the Microsoft Outlook Desktop Client.
30 Setting Up Gmail

Overview of Oracle Sales Cloud for Gmail

Oracle Sales Cloud for Gmail helps increase sales productivity by providing your sales application capabilities within Gmail. Sales professionals can easily access the cloud service data such as contacts, appointments and emails from their Gmail account.

Summary of Features

The key features of Oracle Sales Cloud for Gmail are:

- Synchronize contacts and appointments from your sales application with Gmail and have a consolidated view in Gmail.
- Selectively choose which emails, contacts and appointments in Gmail are tracked in your sales application.
- Link your sales application Accounts, Contacts, Leads, Opportunities and Resources with emails, contacts and appointments in Gmail.
- Administrative filters to determine what contacts and appointments synchronize to Gmail to limit the cloud service data in users' Gmail accounts.

Installing and Configuring Oracle Sales Cloud for Gmail: Explained

You can integrate your sales application with your Gmail account and access your contacts, appointments, and emails from your Gmail account. This topic explains how to install and sign in to the Oracle Sales Cloud for Gmail extension, how to upgrade to new versions, and how to uninstall.

To install the Oracle Sales Cloud for Gmail extension:

1. View the MOS note at https://support.oracle.com/epmos/faces/DocumentDisplay?id=2188228.1 for details on where to find the Gmail Extension on the Chrome Web Store.
2. Click Add to Chrome.
3. On the confirmation dialog box, click Add.

The Chrome extension for your sales application is now added to your Chrome browser.

The Oracle Sales Cloud for Gmail extension appears as a side panel on your Gmail when you open an appointment or an email.

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.
To uninstall the Oracle Sales Cloud for Gmail extension:

1. Navigate to Chrome Settings.
2. Click Extensions.
3. Find the Oracle Sales Cloud for Gmail extension and click the Remove from Chrome icon.

Signing in to Oracle Sales Cloud for Gmail

Once you sign in to Gmail, you must open an appointment or an email for the Oracle Sales Cloud for Gmail side panel to appear.

To configure and sign in to Oracle Sales Cloud for Gmail:

1. Click the Settings icon on the side panel.
2. On your sales application connection page, enter the host name.

To obtain the host name, sign in and navigate to Accounts, and copy the server portion of the URL, for example, https://slc11kez.us.oracle.com. The following figure shows the sample URL with the portion you should copy highlighted.

3. Sign in using the salesperson user name and password that you use to sign in to your sales application.

Upgrading to New Versions

Oracle Sales Cloud for Gmail detects when a new version of the extension is available and automatically upgrades you to the latest version. If your Chrome browser is open, the upgrade happens only when you restart the browser.

Sales Application and Gmail Synchronization: Explained

You can synchronize your contacts and appointments between your sales application and Gmail. This topic explains how synchronization works when you create, update, or delete records in your sales application in Gmail.

New Records

Contacts and appointments that you create in your sales application are added to Gmail during synchronization, based on the saved search criteria that you have defined. However, contacts and appointments that you create in Gmail are not
synchronized with your cloud service server. You can synchronize contacts and appointments with your sales application only through the Oracle Sales Cloud for Gmail side panel.

**Note:** If you mark a new contact as favorite in your sales application, the contact does not appear as favorite in Gmail.

### Updated Records

Contacts and appointments that are already shared with your sales application can be updated directly in Gmail or in the side panel.

- **Updates in the side panel:** If you update your record in the side panel, the record is updated in your sales application as soon as you save your record.
- **Updates in Gmail:** If you update the record in Gmail, the record in your sales application is updated during the next synchronization. Any updates to records in your sales application are updated in Gmail during the next synchronization.

### Deleted Records

You can delete records only in your sales application. If you delete a shared contact or appointment in Gmail, the record is shared with Gmail again from your sales application during the next synchronization.

### Simultaneous Updates to Records

If contacts or appointments are updated simultaneously in your sales application and Gmail, the updates in your cloud service server are retained and synchronized with Gmail. Between synchronization cycles, even if a record is updated first in your sales application and then in Gmail, the updates made in your sales application are retained and synchronized with Gmail.

For example, your synchronization duration is set to run once every hour starting at 12.00 a.m. During the synchronization cycle between 2.00 p.m. and 3.00 p.m., a salesperson updates the mobile number of a contact in your sales application at 2.10 p.m. You update the mobile number of the same contact on Gmail at 2.45 p.m. When synchronization runs at 3.00 p.m., your changes on the contact will be lost and the mobile number update on your sales application will be brought down to Gmail although you made your change later in the synchronization cycle.

**Related Topics**

- Synchronization Settings: Explained

### Scheduling Gmail Synchronization Job: Procedure

You can schedule jobs in Scheduled Processes to synchronize your contacts and activities between your sales application and Gmail. This topic explains how you can set up a synchronization job for your Oracle Sales Cloud for Gmail.

Before you schedule jobs for synchronization, you must enable the profile options ZOE_GOI_ENABLE_APPOINTMENT_SYNC and ZOE_GOI_ENABLE_CONTACT_SYNC so that the scheduled synchronization jobs run successfully.

To schedule a synchronization job:

1. Sign in as a sales administrator.
2. Click the **Navigator** icon, and click **Scheduled Processes**.
3. On the Scheduled Processes page, click the **Schedule New Process** button.
4. On the Schedule New Process dialog box, select **Job** as the **Type**.
5. Click the **Name** drop-down list and click **Search**.
6. Search for **Synchronization Between Sales Cloud and Gmail**.
7. Select **Synchronization Between Sales Cloud and Gmail** under the search results and click **OK**.
8. On the Schedule New Process dialog box, click **OK**.

The Process Details dialog box appears that displays the details of the synchronization process.

![Process Details](image)

**Note:** If you want to run a one time synchronization, click **Submit** and synchronization occurs immediately.

9. Click the **Advanced** button.
10. On the **Schedule** tab, select **Using a Schedule**.
11. Select the frequency in which you want the process to run.

Set the synchronization frequency depending on your data volume. If synchronizations are set to run too frequently, some updates might not be processed. Set the frequency to a minimum of 5 minutes. If the data volume is low (less than 200 records updated in your sales application and Gmail together), set the frequency to 5 minutes. However, if the data volume is high (more than 1000 records updated in your sales application and Gmail together), set a frequency of 30 minutes.

12. Select the start and end dates.
13. Click **Submit**.

The job is now scheduled and synchronization takes place based on the frequency that you selected.
31 Understanding Analytics

Providing Analytics for Sales Users: Overview

Sales analytics help sales teams continuously monitor and interpret key performance indicators for their organizations. Analytics provide insight on your sales pipeline, opportunities, performance, forecasts, activities, and customers.

Analytics in Sales Team Work Areas

Administrators can add analytics to sales user work areas in a variety of different ways. Signed-in sales users see the analytics the administrators have set up for them, and can search and add analytics as favorites on their own Analytics pages. The following table shows the analytics work areas:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Visibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales pages</td>
<td>These pages include five blank pages that administrators configure, and to which they add prebuilt or user-defined analytics.</td>
<td>Not visible until administrators enable the Sales Pages in Set System Options</td>
</tr>
<tr>
<td>Sales infolet pages</td>
<td>Infolet pages come prebuilt with role-based analytics and infolets. One page is supplied for each role.</td>
<td>Not visible until administrators enable the Sales Infolets in Set System Options</td>
</tr>
<tr>
<td>Object pages</td>
<td>Analytics can be added to the following business object work area pages:</td>
<td>To add analytics tabs to these pages, administrators must set variables on the analysis, enable the subtab or side tab for the page, and then add an analysis on the page’s analytics tab.</td>
</tr>
<tr>
<td></td>
<td>• Leads&lt;br&gt;• Opportunities&lt;br&gt;• Forecasts&lt;br&gt;• Accounts&lt;br&gt;• Households&lt;br&gt;• Contacts&lt;br&gt;• Activities</td>
<td></td>
</tr>
<tr>
<td>Analytics pages</td>
<td>In their Analytics pages, users can add analyses themselves by searching for an analysis and making it a favorite.</td>
<td>Administrators make company-defined analytics available for users on the Analytics page by adding session variables on an analysis. These variables can show data specific to the signed-in user viewing her Analytics page.</td>
</tr>
</tbody>
</table>
Briefing Books

A briefing book is a collection of BI analyses or dashboard pages (which can contain reports) that you create and save for later access. The static snapshots give you a picture of what’s going on at the time that the analysis or dashboard page is added to the briefing book. You can download briefing books as PDF or MHTML for viewing or printing, and share them with others. The PDF file includes a table of contents for the book. Like analytics and reports, briefing books are stored in the BI catalog.

Scheduled Analytics

You can submit reports as scheduled processes, and you can set up agents to email analytics, briefing books, and dashboards.

Mobile

Using Oracle Mobile analytics, sales personnel can access analytics and reports from the Home page of a mobile device. Analytics also are embedded contextually for accounts. The contextual reports include data on sales account revenue trends, sales account win/loss trends, and sales account win/loss reasons.

The following figure shows analytics on mobile devices.
Additional BI Resources

To find more information about Oracle Business Intelligence, see Creating and Administering Analytics guide.

Building Your Own Analytics: Explained

Oracle Business Intelligence (BI) holds all the analytics that are added to work areas. There are tools to build your own analytics, as well as edit the prebuilt analytics. All of the analytics are built using subject areas. Subject areas are built around sets of key business questions for a particular context, such as pipeline, performance, quota, activity, and so on.

To get to BI:

1. Click Navigator then Reports and Analytics.
2. In the Reports and Analytics pane, select the Browse Catalog open book icon.

To begin creating analyses, in BI, you select New and then Analysis, and then select from a variety of subject areas that hold the data that you use for building your analytics.

This figure shows an example of the subject areas in BI.

Once you select the subject area, the subject area opens up and you can add the columns to the editor.

This figure shows the palette for creating new analytics, and the Sales - CRM Pipeline subject area with the related data objects to build your analytic.
Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name.

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved filter by clicking on add button after selecting its name in the catalog pane.
Managing Audit Policies: Explained

Auditing is used to monitor user activity and all configuration, security, and data changes that have been made to an application. Auditing involves recording and retrieving information pertaining to the creation, modification, and removal of business objects. All actions performed on the business objects and the modified values are also recorded. The audit information is stored without any intervention of the user or any explicit user action.

Use audit policies to select specific business objects and attributes to be audited. The decision to create policies usually depends on the type of information to be audited and to the level of detail required for reporting.

Enabling Audit Functionality

For Oracle Applications Cloud, you must configure the business objects and select the attributes before enabling audit. If you enable audit without configuring the business objects, auditing remains inactive. By default, auditing is disabled for all applications. To enable and manage audit, ensure that you have a role with the assigned privilege Manage Audit Policies (FND_MANAGE_AUDIT_POLICIES_PRIV). For appropriate assignment of roles and privileges, check with your security administrator.

To enable auditing for Oracle Fusion Middleware products, select one of the levels at which auditing is required for that product. The audit levels are predefined and contain the metadata and events to be audited. For more information, see Audit Events for Oracle Applications Cloud Middleware (Doc ID 2114143.1) on My Oracle Support at https://support.oracle.com.

If you don’t want an application to be audited, you can stop the audit process by setting the Audit Level option to None.

Related Topics

- Audit Events for Oracle Applications Cloud Middleware

Audit History: Explained

Using audit history you can view changes to the application data such as the business objects that were created, updated, and deleted. To view the history or to create a report, you must have a role with the assigned privilege View Audit History (FND_VIEW_AUDIT_HISTORY_PRIV). For appropriate assignment of roles and privileges, check with your security administrator.

To open the Audit History work area, click **Navigator > Audit Reports**.

The default search displays a summary of the audit history in the search results table. It includes key data such as date, user, product, event type, business object type, and description. For a detailed report, search again with modified search criteria. You can export the report summary to Microsoft Excel.
The following table lists the search parameters used and the outcome of their selection in the detailed report.

<table>
<thead>
<tr>
<th>Search Parameter</th>
<th>Result of Selection</th>
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</thead>
<tbody>
<tr>
<td>Business Object Type</td>
<td>• Narrows the search results to that specific business object within the selected product.</td>
</tr>
<tr>
<td></td>
<td>• Enables the Show Attribute Details check box.</td>
</tr>
<tr>
<td><strong>Note:</strong> This parameter is applicable only for the business objects that belong to Oracle Applications Cloud.</td>
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</tr>
<tr>
<td>Include Child Objects</td>
<td>Displays all the child objects that were listed for that business object when audit was set up. For example, a sales order object that contains several items as child objects.</td>
</tr>
<tr>
<td><strong>Note:</strong> Displays the objects at the immediate parent-child level only. To view the children at subsequent levels, select the child object as the business object type and search again.</td>
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</tr>
<tr>
<td>Show Impersonator</td>
<td>Displays the details of the impersonator who modified the objects during an impersonation session.</td>
</tr>
<tr>
<td>Show Attribute Details</td>
<td>Enables the attribute list so that users can select either all attributes or a specific attribute to view the changes. Based on the selection, the search results indicate whether the attribute is created, updated or deleted, and the corresponding old and replaced values.</td>
</tr>
<tr>
<td>Show Additional Object Identifier</td>
<td>Displays the instances (contexts) in which the business object was used. The context values identify the objects and the transactions in which they were used. Each context is unique and assigns a unique description to the business object.</td>
</tr>
</tbody>
</table>

**Note:** The default report displays a standard set of columns that contain prominent details of the audit history. To view additional details, you can change the display of columns.

**Related Topics**

- Audit Event Types: Explained

### Using Auditing to Monitor Application Changes

You use auditing to monitor user activity and all configuration, security, and data changes that have been made to an application. You can enable business objects to allow auditing, recording, and retrieving information about when the objects were created, modified, and removed.

The following table shows the business objects you can enable for auditing.

<table>
<thead>
<tr>
<th>Area</th>
<th>Parent Objects</th>
<th>Child Objects</th>
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</thead>
<tbody>
<tr>
<td>Account and Contact Management</td>
<td>Account (Account Profile)</td>
<td>Sales Account Profile</td>
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<tr>
<td></td>
<td></td>
<td>Sales Account Resource</td>
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</tbody>
</table>
### Understanding Audit Policies

<table>
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<tr>
<th>Area</th>
<th>Parent Objects</th>
<th>Child Objects</th>
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<tbody>
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<td></td>
<td>Sales Account Territory</td>
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<td>Address</td>
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<td>Additional Account Name</td>
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<td>Contact Preference</td>
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<td>Additional Identifier</td>
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<td>Source System References</td>
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<td>Relationship</td>
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<td>Customer Contact Profile</td>
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<td>• Sales Representative Setup</td>
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<td>Partner Relationship Management</td>
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<td>Partner Relationship Management</td>
<td>Partner Program</td>
<td>• Program Benefit Details</td>
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<td></td>
<td>• Program Objective Details</td>
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</tbody>
</table>
### Implementation Concepts for Audit Policies

### Configuring Audit Business Object Attributes: Points to Consider

Audit enables tracking the change history of particular attributes of a business object. However, those objects and their attributes must be selected for audit and auditing must be enabled for that application. Your configuration settings determine which attributes to audit for a given object, and when the audit starts and ends. Auditing takes into account all the operations performed on an object and its attributes, such as create, update, and delete. To configure audit business object attributes, search for the Manage Audit Policies task in the Application Extensions functional area within your offering.

**Selecting an Application**

To set up auditing, you must select a web application that contains the required business objects that can be audited. From the list of business objects, select those business objects that you want to audit. Selecting a business object also displays its attributes that are enabled for auditing.

**Selecting Attributes**

For each selected business object to be audited, select the corresponding attributes to include in the audit. All attributes that belong to that object are by default selected for audit and appear on the user interface. However, you can add or remove attributes from the list. When you remove an attribute from the list, you stop auditing it even when the parent object is selected for audit. So, if you want an attribute to be audited, you must add it to the list. If the object selected in an audit hierarchy is also a part of several other audit hierarchies, the attribute configuration for that object is applicable to all the hierarchies in that application.

**Tip:** For business objects based on flexfields, select the Flexfields (Additional Attributes) check box to view and add or remove flexfield attributes, to include or exclude them from the audit.

**Starting and Stopping Audit**

The business object is ready for audit after you select its attributes and save the configuration changes. However, to start auditing, the audit level for Oracle Applications Cloud must be set to **Auditing** on the Manage Audit Policies page.

<table>
<thead>
<tr>
<th>Area</th>
<th>Parent Objects</th>
<th>Child Objects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner Relationship Management</td>
<td>Partner Enrollment</td>
<td>• Program Contract Templates</td>
</tr>
<tr>
<td>Territory Management</td>
<td>Sales Territory</td>
<td>• Enrollment Participants</td>
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<td>• Contract Enrollments</td>
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<td>• Sales Territory Resource</td>
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<td>• Sales Territory Line of Business</td>
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<td>• Sales Territory Coverage</td>
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<td>• Sales Territory Coverage Dimension</td>
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<td>• Sales Territory Coverage Dimension Value</td>
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<tr>
<td>Sales Territory Proposal</td>
<td>Sales Territory Proposal</td>
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</tbody>
</table>
To stop auditing an object, you can deselect the entire object and save the configuration. As a result, all its selected attributes are automatically deselected and are not audited. To continue to audit the business object with select attributes, deselect those attributes that are not to be audited. When users view the audit history for an application, they can specify the period for which they want the results. Therefore, make a note of when you start and stop auditing an application.

For example, users intend to view the audit history of an object for the previous week, but auditing for that object was stopped last month. They wouldn’t get any audit results for that week, because during the entire month that object wasn’t audited. Even if you enable audit for that object today, users can’t get the wanted results because audit data until today isn’t available.

### Configuring Audit: Highlights

To set up auditing for Oracle Applications Cloud, use the Manage Audit Policies task from the Application Extensions functional area within your offering. To set up auditing for Oracle Fusion Middleware products, select the level of auditing mapped to a predefined set of metadata and the events that have to be audited. Information about configuring audit for Oracle Fusion Middleware products is provided in Oracle Fusion Middleware guides.

You can also create a configuration file and deploy it to audit a specific Oracle Fusion Middleware product. The configuration details for Oracle Fusion Middleware products are available as audit-specific assets that you can use to create the config.xml configuration file. To get a list of audit-specific assets, see Audit Events for Oracle Applications Cloud Middleware (Doc ID 2114143.1) on My Oracle Support at https://support.oracle.com.

### Oracle Fusion Middleware Products


  See: Auditing Web Services

### Oracle Fusion Security Products

- Configure business objects to enable auditing in Oracle Fusion security products. Refer to Oracle Fusion Middleware Application Security Guide.

  See: Oracle Fusion Middleware Audit Framework Reference

### Related Topics

- Audit Events for Oracle Applications Cloud Middleware
Chapter 33

Additional Configurations and Integrations

Additional Sales Configurations and Integrations: Overview

The application offers several ways to configure and enhance its services, components, and modules. You can import and export data and integrate the service with other products and modules.

Modification and integration options include:

- Modify objects, user interfaces (UIs), and the Navigator menu.
- Change the appearance and theme of the UIs.
- Configure the Home page by adding announcements.
- Configure Home page navigation.
- Change the structure of the springboard.
- Modify online help.
- Access a rich set of subject areas around which to build your own reports.
- Configure reporting dashboards by adding new reports or changing the layout.
- Create copy maps to map fields or add information between copied business objects.
- Configure security components.
- Use web services to integrate the services.
- Export data, modify it, and then import it back into the services.
- Integrate with other applications to enhance the functionality.

For information on configuring Oracle Applications Help, see the Setting Up Common Components chapter in this guide and the Extending Sales guide.

Modifying Objects, UIs, and the Navigator

Use Application Composer to modify the applications. For example, create a new object and related fields, then create new pages where that object and its fields are exposed to users.

The following are some ways that you can modify objects, the UI, and the Navigator.

- Use Page Composer to edit the UI at run time. For example, show and hide regions, fields, and tables. Change the order of regions, or change a dashboard page layout.
- Determine which icons to display across the top of the page (the area known as the springboard), as well as the welcome message or announcement.
- Add and remove links from the Navigator menu.
- Change the default text in the UI, for example, by replacing a term with another term throughout the applications.

For more information, see these guides:

- Extending Sales
- Oracle Applications Cloud Configuring and Extending Applications
Modifying Reports and Dashboards

The applications are predefined with reports that give you instant data about your customers, leads, opportunities, forecasts, and sales revenue. If the supplied reports do not meet all of your business needs, you can use Oracle Business Intelligence (BI) Composer to create your own reports against a rich variety of subject areas.

For more information, see these guides:

- Creating and Administering Analytics for Sales
- Extending Sales

Creating Copy Maps

Copy maps are default mappings of fields between objects. For example, when you convert a lead to an opportunity, the application uses the copy map defined for the Lead and Opportunity objects to determine what to name the leads fields that are carried over to the newly created opportunity. Using Oracle Application Composer, you can create copy maps for several sales business objects, thus allowing you to control the mapping.

Following are some use cases:

- Create maps to change the default mapping between fields when:
  - Leads and opportunities are copied from responses
  - Opportunities are created from leads
  - Opportunities are created from partner deal registrations
  - Opportunities are copied from existing opportunities
- Use Groovy scripting to include information about the lead on a new opportunity converted from a lead.

For more information, see the topics on copy maps in the Extending Sales guide.

Integrating Applications Using Web Services

You can use web services available to integrate with your external applications. Example integrations include:

- Integrate sales applications with back-office applications.
- Create web-based portal applications that access sales applications through a web services interface.

For more information, see the chapter in this guide on import and export, as well as the article on sales web services (1354841.1) available on My Oracle Support.

Configuring Security Components

If the predefined security configuration doesn't meet your business needs, then you can make changes. For example, the predefined Sales Representative job role includes sales forecasting duties. If some business groups in your organization have the sales managers perform forecasting tasks instead of the sales representatives, then you can create a company-defined Sales Representative role without those duties. Alternatively, if a predefined job role is too narrowly defined, then you can create a job role with a greater range of duties than its predefined equivalent. See the Securing Sales guide for more information.
Exporting and Importing Data
You can import data into or export data out of the applications in order to speed the processes involved with getting data into the application. You can find an introduction to bulk export and file-based import and export in the chapter, Understanding Import and Export, in this guide. Get more information on territory and quota export and import in this guide, in the Setting Up Territories and Setting Up Quotas chapters.

Integrating with Other Products
For additional functionality, you can integrate your sales applications with other products, including, Oracle E-Business Suite, JD Edwards EnterpriseOne, Siebel CRM, Oracle Marketing Cloud, and Oracle CPQ Cloud Service. For more information on these integrations, see the article on sales integrations (1962226.1) available on My Oracle Support.

Related Topics
• My Oracle Support
• Defining Home Page Display Settings: Procedure
• Oracle Cloud Documentation

Cross-Origin Resource Sharing
CORS: Explained
Cross-Origin Resource Sharing (CORS) enables secure cross domain communication from a browser. You can configure CORS headers to enable a client application running in one domain to retrieve resources from another domain, using HTTP requests. By default, browser-based programming languages, such as JavaScript, can access content only from the same domain. CORS provides a mechanism to overcome this limitation and access resources from different domains.

To enable CORS in Oracle Applications Cloud, you must set profile option values for the CORS headers in the Setup and Maintenance work area. This table lists the supported CORS headers.

<table>
<thead>
<tr>
<th>CORS Header</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access-Control-Allow-Origin</td>
<td>Contains a comma-separated list of trusted origins that a client application can access resources from.</td>
</tr>
<tr>
<td>Access-Control-Max-Age</td>
<td>Specifies the duration of storing the results of a request in the preflight result cache.</td>
</tr>
<tr>
<td>Access-Control-Allow-Methods</td>
<td>Contains a comma-separated list of permitted HTTP methods in a request.</td>
</tr>
<tr>
<td>Access-Control-Allow-Headers</td>
<td>Contains a comma-separated list of permitted HTTP headers in a request.</td>
</tr>
<tr>
<td>Access-Control-Allow-Credentials</td>
<td>Specifies whether a client application can send user credentials with a request.</td>
</tr>
</tbody>
</table>
Example
A client application retrieves resource X from server A, which runs the application logic. The client application then makes an HTTP request to retrieve resource Y from server B. To allow this cross-server request from the client application, you must configure the Access-Control-Allow-Origin header in server B. Otherwise, the request fails and displays an error message.

Related Topics
- Setting Profile Option Values: Procedure

Managing Profile Option Values for CORS Headers: Points to Consider
You can set profile option values for the CORS headers using the Manage Administrator Profile Values task in the Setup and Maintenance work area.

CORS Headers
This table lists the CORS headers that you can set profile option values for.

<table>
<thead>
<tr>
<th>CORS Header</th>
<th>Profile Option Name (Profile Option Code)</th>
<th>Profile Option Values</th>
</tr>
</thead>
</table>
| Access-Control-Allow-Origin  | Allowed Domains (ORACLE. ADF. VIEW. ALLOWEDORIGINS) | Valid values for allowed origins:
  - URL of the specific origin, for example, http://www.mydomain.com
  - * to allow access to resources from all origins
  - Empty (no value set) to prevent access to resources from any origin
  - Note: You must set a value for this header to enable CORS. |
| Access-Control-Max-Age       | CORS: Access-Control-Max-Age (CORS_ACCESS_CONTROL_MAX_AGE) | Default value for caching preflight request is 3600 seconds. |
| Access-Control-Allow-Methods | CORS: Access-Control-Allow-Methods (CORS_ACCESS_CONTROL_ALLOW_METHODS) | Default values for allowed methods are OPTIONS, HEAD, GET, POST, PUT, PATCH, DELETE. |
| Access-Control-Allow-Headers | CORS: Access-Control-Allow-Headers (CORS_ACCESS_CONTROL_ALLOW_HEADERS) | Default values for allowed headers are Accept, Accept-Encoding, Cache-Control, Content-MD5, Content-Type, If-Match, If-None-Match, Origin, User- |
### Note
You must include `Authorization`, with a comma as the delimiter, to the list of allowed headers. For example: `Accept, Accept-Encoding, Cache-Control, Authorization`.

<table>
<thead>
<tr>
<th>CORS Header</th>
<th>Profile Option Name (Profile Option Code)</th>
<th>Profile Option Values</th>
</tr>
</thead>
</table>
| Access-Control-Allow-Credentials | CORS: Access-Control-Allow-Credentials (CORS_ACCESS_CONTROL_ALLOW_CREDENTIALS) | • True to enable sending credentials with the request  
• False, which is the default value, to disable sending credentials with the request |

### Related Topics
- Setting Profile Option Values: Procedure

### Integrating Sales With Policy Automation
### Setting up Oracle Policy Automation Interviews in Sales: Overview

Oracle Policy Automation is a suite of tools used to build smart interactive interviews that support your organization’s business policies. For example, you might use Policy Automation to determine whether a contact qualifies for a discount and the amount of that discount. In this case, you might have rules around how long the contact has been a customer or previous product preferences. These rules can be built into the interview by your modelers.

Policy Automation provides a central hub from which all the connections and interview projects are managed. There is desktop modeling software for building interviews called Policy Modeling. The Policy Automation hub connects Policy Modeling to sales.
The following figure shows how Oracle Policy Modeling, Oracle Policy Automation Hub, and sales applications work together to provide interviews.

The first step to integrate Policy Automation is to create the sales applications web service connection in the Policy Automation hub that your team can use for new or existing interviews.

Once the connection to the sales web service is established, the modelers must go to the hub and download Policy Modeling. The next step is to connect the local instance of Policy Modeling to the Policy Automation hub which provides access to the Sales Cloud data model. Modelers can then map the data in the policy model to the appropriate tables and fields in sales. For example, modelers can use the data mappings to provide pre-seeded information in the interviews derived from sales data sources.

This figure shows the Policy Automation Hub and the connections icon as well as the link to download Policy Modeling.
The three main tasks to setting up Policy Modeling for sales are the following:

- Create a web service connection to the sales applications
- Download and install the Policy Modeling desktop tool
- Connect your instance of the desktop tool to the hub

**Related Topics**

- Policy Automation Documentation Library

**Connecting to Oracle Policy Automation in Oracle Sales Cloud**

You need to connect Policy Automation to Sales Cloud in your hub to get started with your interview projects.

**Connecting Policy Automation**

Your install administrator provides the hub URL which is where you connect your Sales Cloud web service. They should have set up access for the Sales Administrator, or a similar role that administers Policy Automation for your organization. The URL for the hub is in this general format https://<server and port>/<deploy-name>/opa-hub/<project>. Once you sign in to the hub, you create a connection to your Sales Cloud web services to get access to data for creating or editing interviews.

To connect to Oracle Policy Automation:

1. Sign in to the hub.
2. Click the **Connections** icon on the hub home page.
3. Click **Actions** select **Create a New Connection** from the drop-down list.

This figure shows the Create a New Connection option on the Connections page.

![Create a New Connection](image)

4. The New Connection page opens. Add a name for your connection. Leave Type as Web service and Collection Access as Default Collection.

5. Enter the web service host URL. The URL must be of the format: `https://<SALES_CLOUD_HOST_NAME>/soa-infra/services/default/SalesPolicyConnectorComposite/SalesPolicyConnectorService`...

If you don’t know the **SALES_CLOUD_HOST_NAME**, you can obtain it using the following steps:

   a. Sign in to Sales Cloud.
   b. From the Home page click the Sales icon.
   c. Click **Opportunities**.
   d. Use the URL of the Opportunities page to obtain the **SALES_CLOUD_HOST_NAME**. For example, if `https://your.server.name.oraclecloud.com/sales/faces/FuseOverview?t<your parameters>` is the application URL, the **SALES_CLOUD_HOST_NAME** is `your.server.name.oraclecloud.com`. In the above case, the connection URL is `https://your.server.name.oraclecloud.com/soa-infra/services/default/SalesPolicyConnectorComposite/SalesPolicyConnectorService`.


7. Check **Provide OAUTH bearer token in HTTP header on Load and Save actions**.

8. Enter the URL Parameter as `jwt` (JavaScript Object Notation web token).

9. Check **Provide WS-Security user name token in SOAP actions**.

10. Enter the user name and password for the Sales Administrator role.

11. Select **Applies to All**.

12. Check to **Include time stamp with a five minute expiration**.
This figure shows the page to create a new connection.

13. Click **Save and Close**.
14. On the Connections page, verify that the status of the new connection is connected, which is indicated with a green tick.

**Object Support For Policy Automation**

Oracle Policy Automation supports a variety of object for interview development.

The following are the policy modeling objects that are supported:

<table>
<thead>
<tr>
<th>Parent Object</th>
<th>Child Objects Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Contacts, Activities, Leads, Opportunities, Attachment, Customer Contact Profile, Service Request, Custom objects</td>
</tr>
<tr>
<td>Contact</td>
<td>Activities, Leads, Opportunities, Assets, Attachments, Primary Address, Customer, Contact Profile, Service Request, Custom objects</td>
</tr>
<tr>
<td>Household</td>
<td>Contacts, Team Members, Activities, Leads, Opportunities, Assets, Custom Objects, Attachments</td>
</tr>
<tr>
<td>Partner</td>
<td>Leads, Opportunities, Activities, Enrollment, Attachments, Contacts, Custom objects</td>
</tr>
<tr>
<td>Lead</td>
<td>Products, Activities, Notes, Opportunities, Attachments, Contacts, Custom objects</td>
</tr>
<tr>
<td>Opportunity</td>
<td>Contacts, Products, Activities, Notes, Leads, Activity, Revenue Line/Product, Attachments, Custom objects</td>
</tr>
</tbody>
</table>
Installing and Connecting Oracle Policy Modeling to Sales

Once Oracle Policy Automation is connected to sales, the next step is to install Policy Modeling.

**To Install Policy Modeling**

Policy Modeling is a desktop tool modelers must install to create and edit interviews.

To install Policy Modeling:

1. Sign in to your hub.
2. Download and install Policy Modeling.

Once you have created your Policy Automation interview, it must be deployed to the hub and activated. Take note of the URL of your deployed interview, you need this to link to the interview from sales.

**To Connect Policy Modeling to the Hub**

Policy Modeling must be connected to the hub to get access to the Sales Cloud data model.

To connect to the hub:

1. Open Policy Modeling from the desktop start menu.
2. Open or create a new policy modeling project.
3. Go to Project > Hub and sign in to the hub.

**Working with Policy Modeling**

Your Policy Modeling is connected to the hub and you are ready to work on your interviews. For sales, the following objects are available to use in your interviews:

<table>
<thead>
<tr>
<th>Parent Object</th>
<th>Child Objects Available for Policy Modeling</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Contacts, Activities, Leads, Opportunities, child custom object</td>
</tr>
<tr>
<td>Contact</td>
<td>Activities, Leads, Opportunities, Assets, child custom object</td>
</tr>
<tr>
<td>Household</td>
<td>Contacts, Members, Activities, Leads, Opportunities, Assets, child custom object</td>
</tr>
<tr>
<td>Partner</td>
<td>Leads, Opportunities, Activities, Enrollment, child custom object</td>
</tr>
<tr>
<td>Parent Object</td>
<td>Child Objects Available for Policy Modeling</td>
</tr>
<tr>
<td>---------------</td>
<td>---------------------------------------------</td>
</tr>
<tr>
<td>Lead</td>
<td>Products, Activities, Notes, Opportunities, child custom object,</td>
</tr>
<tr>
<td>Opportunity</td>
<td>Products, Activities, Notes, Leads, Activity, child custom object</td>
</tr>
<tr>
<td>Service Request</td>
<td>Activities, custom object</td>
</tr>
<tr>
<td>Custom Object</td>
<td></td>
</tr>
</tbody>
</table>

When you are finished with your interview, you need to deploy it to the cloud (hub) for use by sales. After deployment, link to the interview from within sales (from a link, button, action menu item, knowledge article, and so on). For more information, See the Related Links for Policy Automation Quick Start for Cloud Service.

**Related Topics**

- Policy Automation Quick Start for Cloud Service
- Discover the Policy Modeling User Interface
- Load and Save Data from an External Application
34 Understanding Import and Export

File-Based Data Import and Export: Overview

You can use file-based data import and export to import and export a wide range of application data. For example, you can use the file-based data export feature to export object data so that you can then import it into another instance. And, for example, you can import records sales business objects into the applications so that you don’t have to create the records in the UI.

Most of the sales business objects are import and export candidates, including:

- Accounts
- Addresses
- Appointments
- Classification codes
- Click-to-dial agents
- Consumers
- Contacts
- Contracts
- Country structures
- Customer hierarchies
- Employee resources
- Geographies
- Households
- Legal entities
- Marketing campaigns and responses
- Leads
- Notes
- Opportunities
- Partners
- Promotions
- Product groups
- Quotas
- Source system references
- Territories
- Tasks
- Users

Note that you can also import attachments for several business objects. For more information, see the Understanding File-Based Data Import and Export guide. For an introduction to file-based import and simplified setups for import, see the Getting Started with Your Sales Implementation guide.
Related Topics

- Understanding File-Based Data Import and Export guide
- Getting Started with Your Sales Implementation guide
Glossary

**action**
The kind of access, such as view or edit, named in a security policy.

**adjusted forecast**
Total forecast for all product items that meet forecast criteria plus a salesperson's adjustment amount, which can be a positive or negative number.

**adjusted territory quota**
The quota amount assigned to the user plus the adjustment amount entered.

**adjustment threshold**
Largest percentage of a quota that can be added as an adjustment.

**autosuggest**
Suggestions that automatically appear for a search field, even before you finish typing your search term. You can select any of the suggestions to run your search.

**B2B**
Acronym for business-to-business. Indicates the type of customer relationship with a business, where the customer is a business rather than an individual consumer.

**B2C**
Acronym for business-to-consumer. Indicates the type of customer relationship with a business, where the customer is an individual consumer rather than a business.

**briefing book**
A collection of static or updatable analyses or dashboard pages that you can download, print, and share with others.

**business function**
A business process or an activity that can be performed by people working within a business unit. Describes how a business unit is used.

**business object**
A resource in an enterprise database, such as an invoice or purchase order.

**business unit**
A unit of an enterprise that performs one or many business functions that can be rolled up in a management hierarchy.
**candidate object**
A candidate object is a business object, such as a resource or a territory, that is associated with one or more work objects for eventual assignment. Creating a candidate object involves entering its application information and selecting its attributes to use in rules or mappings.

**CORS**
Acronym for Cross-Origin Resource Sharing. A web service standard to enable a client application running in one domain to retrieve resources from another domain, using HTTP requests.

**customer attribute**
A product owned by the customer or a customer attribute that has influenced the recommended product in past transactions. For example, if customers who bought product A also bought product B, then product A is an influencing customer attribute.

**dashboard**
A page that provides quick access to key tasks and summary information for various objects within a functional area of interest.

**data security**
The control of access and action a user can take against which data.

**deal size**
Total monetary amount the customer is expected to spend.

**determinant**
A value that specifies the use of a reference data set in a particular business context.

**determinant type**
The value that affects sharing of reference data in a transaction across organizations, such as a business unit or a cost organization.

**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.
**dimension member**
Individual components of a dimension. For example, Japan is a member of the geography dimension.

**distinct values**
Count of distinct attribute values.

**document sequence**
A unique number that is automatically or manually assigned to a created and saved document.

**eligibility rule**
Rules that define what can or cannot be sold to what customers based on a set of eligibility or business criteria, such as due to company policy or customer eligibility constraints. Eligibility rules are evaluated before any recommendations can be made.

**enterprise**
An organization with one or more legal entities under common control.

**feature**
Business practices or methods applicable to the functional areas that enable the fine-tuning of business functionality.

**field sales**
Sales representatives dedicated to working directly with their customers, often making presentations in person, to close deals.

**forecast due date**
The date after which the forecast changes from current status to past status and no changes can be made to the forecast.

**global header**
The uppermost region in the user interface that remains the same no matter which page you're on.

**global search**
The search in the global header that lets you search across many business objects.

**hierarchy version**
Hierarchy version refers to a specific version of a hierarchy. You can create any number of versions, but only one hierarchy version can be active on a specific date. In tree terminology, hierarchy versions are also called tree versions.

**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.

interface table
A database table that stores data during data transfer between applications or between databases that reside inside and outside of an Oracle Fusion application.

internal expert
Experts within your company who have previous experience with a specific competitor.

inventory organization
A logical or physical entity in the enterprise that tracks inventory transactions and balances, stores definitions of items, and manufactures or distributes products.

IQR
Abbreviation for interquartile range. A measure of statistical dispersion being equal to the difference between the upper and lower quartiles. Upper and lower quartiles are the data ranges above 75 percent and below 25 percent of the total data population. The interquartile range is the middle 50 percent of the data in a segment.

item master
A collection of data that describes items and their attributes recorded in a database file.

item validation organization
The inventory organization that order management uses to identify the items that it displays and validates for a business unit. In order management, the inventory organization typically identifies a warehouse.

job role
A role, such as an accounts payable manager or application implementation consultant, that usually identifies and aggregates the duties or responsibilities that make up the job.

lead
A new prospect or existing customer who has interest or the potential for interest in a product or service being sold. The interest is represented in the application by a lead.

lead rank
A configurable set of values such as hot, warm, or cool used to prioritize leads for lead qualification and sales engagement.

legal entity
An entity identified and given rights and responsibilities by commercial law through the registration with country’s appropriate authority.
**lift**
Indicates the improvement in predictive ability when using association model prediction over randomness. The baseline for lift is 1. If the lift is greater than 1, it indicates that the predictive ability while using prediction is better than randomness.

**likelihood to buy**
Likelihood to buy, also called Confidence, is the ratio that shows the occurrences of the influencing customer attribute compared to occurrences of the recommended product. Likelihood to buy value ranges between 0 and 1, where 0 indicates no occurrence at all and 1 indicates 100% occurrence. Likelihood to buy closer to 1 indicates higher likelihood that the customer will buy the recommended product.

**line of business**
A particular kind of commercial enterprise. For example, a broad grouping of sellable products such as hardware or training.

**lookup code**
An option available within a lookup type, such as the lookup code BLUE within the lookup type COLORS.

**lookup type**
The label for a static list that has lookup codes as its values.

**market potential**
Estimated revenue for sales leads and recommendations within a territory.

**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.

**microsite**
Individual web page or a small cluster of pages meant to function as a discrete entity within an existing website or to complement an offline activity.

**nonrevenue quota**
A type of quota typically assigned to a sales resource with overlay sales roles, such as sales consultants or telemarketing representatives, to measure their performance.

**null percentage**
Refers to the percentage of attribute values that is null. Higher null percentage means the data is not well-populated.

**organization**
A unit of an enterprise that provides a framework for performing legal, managerial, and financial control and reporting. Organizations can be classified to define their purpose, for example, as departments, divisions, legal entities, and can own projects and tasks, or incur project expenses.
**organization hierarchy**
A tree structure that determines the relationship between organizations.

**overlay territory**
A territory, usually owned by an internal employee, whose team supports the sales activities within the territory boundaries. Overlay territories often overlap with one or more prime or other overlay territories.

**prediction rules**
A user-defined business logic that identifies target customer segments for target products based on a set of criteria. Prediction rules predict the likelihood of target customers to buy a product, the average revenue, and the average sales cycle that salespeople could expect.

**predictive model**
Predictive models analyze past sales data to predict future sales potential. For example, models predict likelihood to buy, potential revenue, and estimated length of the sales cycle.

**primary ledger**
Main record-keeping ledger.

**prime territory**
A territory that is usually owned by an internal employee who is directly responsible for sales within the territory boundaries. Prime territories aim to assign sales representatives to each region where potential customers are located.

**privilege**
A grant of access to functions and data; a single, real world action on a single business object.

**profile option**
User preferences and system configuration options that users can configure to control application behavior at different levels of an enterprise.

**profile option value**
The setting mapped to the level of a profile option. A profile option may have multiple values set at different levels, such as Site or User.
**Query By Example**
The icon for filtering data in a table.

**quota**
A revenue target, often tied to expected performance.

**reference data**
Data in application tables that is not transactional or high-volume, which an enterprise can share across multiple organizations. For example, sales methods, transaction types, or payment terms.

**reference data set**
Contains reference data that can be shared across a number of business units or other determinant types. A set supports common administration of that reference data.

**reference group**
A logical collection of reference data sets that correspond to logical entities, such as payment terms defined across multiple tables or views. Based on the common partitioning requirements across entities, the reference data sets are grouped to facilitate data sharing among them.

**report**
An output of select data in a predefined format that’s optimized for printing.

**request call back**
A marketing response form that can be inserted into an e-mail. E-mail recipients can click the link to request a call back.

**resource**
People designated as able to be assigned to work objects, for example, service agents, sales managers, or partner contacts. A sales manager and partner contact can be assigned to work on a lead or opportunity. A service agent can be assigned to a service request.

**resource organization**
An organization whose members are resources. Resource organizations are used to implement sales organizations, partner organizations, and so on.

**resource quota**
The revenue target associated with a territory resource. Resource quota can be either revenue resource quota or nonrevenue resource quota.
resource role
Resource roles indicate the role a resource plays as an individual, or within a resource team.

resource skills
A resource skill is a self-proclaimed, self-rated knowledge set that a resource has. Skills are defined in terms of categories, products, components and platforms.

response
A recorded reaction of a prospect or customer to a marketing activity.

role
Controls access to application functions and data.

rule folder
A folder that enables logical grouping of rules.

rule support
Ratio of occurrence of the influencing customer attribute and recommended product together over total number of records. Support value ranges between 0 and 1, where 0 indicates no occurrence at all and 1 indicates 100% occurrence. Rule support closer to 1 is better than that closer to 0.

sales campaign
A sales campaign enables a salesperson to target customer contacts by email in a personalized campaign, using marketing generated collateral.

sales goal
A business or sales objective represented as a measurable goal. A sales goal is defined by how it’s measured (amount or quantity), and whether or not the goal has a focus such as on specific product groups.

sales promotion
A business object used to offer special pricing, such as a percentage discount, free shipping, or a coupon.

sales quota
Territory and resource quota together compose sales quota.

sales quota plan
Plan that contains all quota activities for the fiscal year, created by the administrator. Actual sales and pipeline are tracked against only one quota plan for the year.
scheduled process
A program that you run to process data and, in some cases, generate output as a report.

set enabled
A property that describes entities that an organization shares as reference data. For example, you can indicate a lookup, customer, location, or document attachment as set enabled.

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

simplified page
A page that’s optimized for performing quick and frequent tasks on any device.

source territory
A territory with one or more dimensions inherited by at least one recipient territory.

springboard
The grid of icons on the home page that you can use to open pages.

standard deviation
A measure of deviation of a set of data from its mean. If the data is spread out over a large range of values, the deviation is higher.

suggestion group
Category of suggestions that appear in the autosuggest for the global search.

SWOT
Abbreviation for strengths, weaknesses, opportunities, and threats. SWOT analyses score the strengths, weaknesses, opportunities, and threats of a sales competitor, as compared to the selling company.

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.

territory proposal
A sandbox container used to model territory changes. All valid territories within a proposal become active on the proposal activation date.

territory quota
The revenue target associated with the expected performance of a territory.

unit of measure
A division of quantity that is adopted as a standard of measurement.

white space analysis
A type of analysis that enables salespeople to identify gaps in the customer’s portfolio so that they can focus on selling products or services that fill those gaps.

work area
A set of pages containing the tasks, searches, and other content you need to accomplish a business goal.

work object
A work object is a business object that requires assignment, such as a lead or an opportunity. Creating a work object involves entering its application information, selecting its attributes to use during assignment, and associating one or more candidates.

workflow
An automated process that passes a task from one user (or group of users) to another to view or act on. The task is routed in a logical sequence to achieve an end result.