Oracle Fusion Sales Cloud Automation

How do I enable multiple business units in Oracle Sales?

Oracle Fusion Sales Cloud Automation
How do I enable multiple business units in Oracle Sales?

G36246-01

Author: Carmen Myrick

Contents

Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Some application pages have help icons ⓘ to give you access to contextual help. 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. If the page has contextual help, help icons will appear.

Get Support

You can get support at *My Oracle Support*. For accessible support, visit *Oracle Accessibility Learning and Support*.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program*. Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!

1 Overview

About Business Units

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 want 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's managed globally and isn't specific to any BU. Examples include:
  - Accounts: Customer accounts can't 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.

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

- Reference data: This is data that's 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: This is the sales user data, such as that associated with leads, opportunities, and contracts that are created during a typical sales process.

Overview of Multiple Business Units in Sales

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, these business objects support the use of multiple BUs:

- Contracts
- Leads
- Opportunities
- Resource Organizations
- Territories

Benefits of Using Multiple BUs

Before implementing a multiple-BU model, think about how your organization would 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.
- Global reporting and forecasting: Get company-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 of Multiple BUs

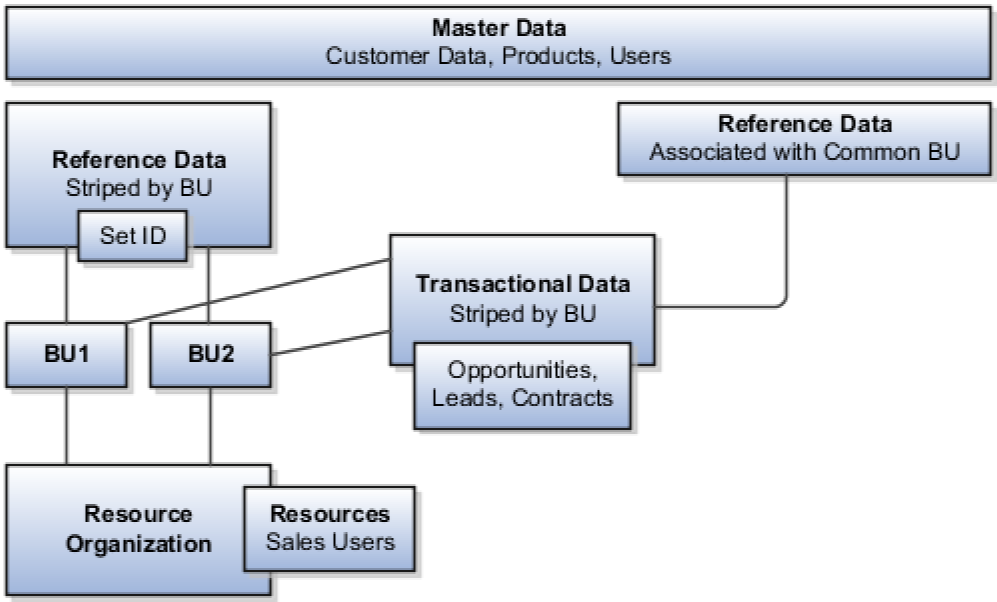
In the sales applications, depending upon your business needs, structuring your enterprise with multiple BUs can be beneficial within the sales business objects that support multiple BUs.

This table lists some of the ways your implementation can benefit from using multiple BUs:

Business Object	Usage or Benefit	Where to Find More Information
Contracts	• You can associate contracts with a BU, allowing them to be restricted by BU. • You can specify some Contract Terms Library components at the BU level. For	*Overview of Multiple Business Units in Contracts*

Business Object	Usage or Benefit	Where to Find More Information
	example, you can enable clause and template adoption at the BU level.	
Leads	• You can associate leads with a BU, allowing transactional data to be restricted by BU. • You can select which assignment rules and assessment templates to use for your leads. • 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.	• *Overview of Multiple Business Units in Leads and Opportunities* • *Set BU-Enabled Attributes for Leads and Opportunities* • *Add the Business Unit Field to the Edit Lead Page* • *Enable Lead Territory Assignment by Business Unit*
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.	• *Overview of Multiple Business Units in Opportunities* • *Set Opportunity Business Unit Properties* • *Add the Business Unit Field to the Edit Opportunity Page*
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.	• *Overview of Sales Resources and Multiple BUs* • *Understanding Associations Between Resource Organizations and BUs*
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.	• *Territories Defined with Business Units* • *Sales Territories and Assignment*

Here's an illustration of the different data types associated with multiple business units. The diagram shows master data, such as customer data, products, and users, independent of BU-striped data. The BU-striped data includes reference data, transactional data, and resource organization and resource user data.

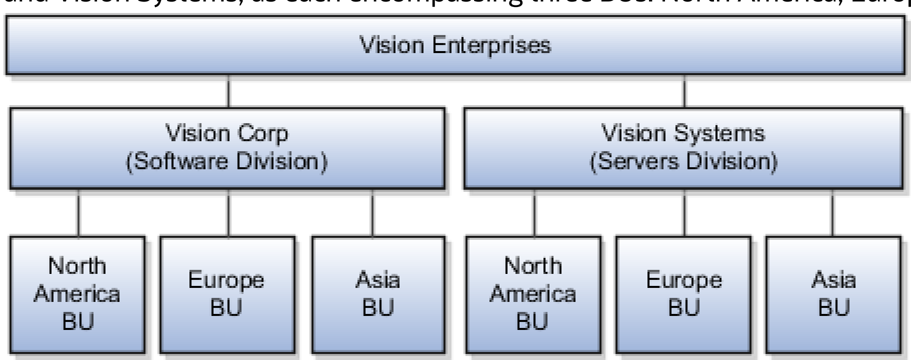


Multiple BUs Use Case

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.

This 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

Keep in mind that by default, sales administrators have access to only the data available in the BU to which they're 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.

Related Topics

- Multiple Business Units High-Level Setup Steps

2 Setup Tasks

Multiple Business Units High-Level Setup Steps

Before you begin implementing multiple business units (BUs) in your sales application, you need to consider all of the steps and options available.

> **Note:** We assume that your company's basic enterprise structure, including a legal entity, legal division, and organizations, is already set up. See the *Understanding Enterprise Structures* guide for information.

Step	Where to Find More Information
Step 1 You must set two profile options to enable multiple-BU functionality in Sales.	*Set Sales Business Unit Profile Options*
Step 2 Define additional business units in the Setup and Maintenance work area. If you've already done this as part of your enterprise setup, then you can skip this step.	• *Define Business Units* • *Oracle Fusion Cloud Applications Understanding Enterprise Structures*
Step 3 Set business unit functions. A business function describes how a business unit is used. You must set business unit functions. If you've already done this as part of your business unit setup, then you can skip this step.	*Set Business Unit Functions*
Step 4 If you're going to partition reference data by BU, you must create additional reference data sets for set-enabled attributes of objects.	• *Overview of Managing Reference Data* • *Create Reference Data Sets*
Step 5 For each BU for which you want to partition data, assign it a default reference data set.	*Specify Business Unit Set Assignments*
Step 6 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.	• *Overview of Sales Resources and Multiple BUs* • *Make Associations Between Resource Organizations and BUs* • *Multiple Business Units and Data Access to Sales Objects*

Step	Where to Find More Information
Step 7 If you want to assign sales team members within territories by BU, you can assign the Business Unit dimension to territories.	• *Territories Defined with Business Units* • *How to Set Up Territory Dimensions* • *How You Model Your Sales Organization*
Step 8 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.	• *Overview of Multiple Business Units in Leads and Opportunities* • *Set BU-Enabled Attributes for Leads and Opportunities* • *Add the Business Unit Field to the Edit Lead Page*
Step 9 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.	• *Overview of Multiple Business Units in Opportunities* • *Set Opportunity Business Unit Properties* • *Add the Business Unit Field to the Edit Opportunity Page*
Step 10 Move opportunities or leads to another BU. Run the Migrate Lead and Opportunity Business Unit Data scheduled process.	*Migrate Lead and Opportunity BU Data*
Step 11 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.	*Overview of Extending the CX Sales Applications*

Set Sales Business Unit Profile Options

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

- 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.

Note: If you exported values for business unit profile options and then imported them into another environment, keep in mind that the values aren't retained, and you need to set them each time after export/import.

To set the profile options:

1. In Setup and Maintenance, Sales offering, go to: **Company Profile functional area** > **Manage Common CRM Business Unit Profile Options task**.

2. In the Manage Common CRM Business Unit Profile Options page, select the HZ_ENABLE_MULTIPLE_BU_CRM profile option and set it to Yes.
3. Click **Save and Close**.
4. Select the HZ_DEFAULT_BU_CRM profile option and set it to the default sales business unit.
5. Click **Save and Close**.

Overview of Enterprise Setups

A single (BU) is created for you when you first set up Sales. You can define more BUs in as needed. If you've already done this as part of your enterprise setup, then you can skip this step.

> **Note:** The setup of business units is part of the enterprise structure setup. This guide assumes that your company's basic enterprise structure, including a legal entity, legal division, and organizations, is already set up.

Here's a brief overview of what enterprise setups include:

- Define the Enterprise
  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.
- Define Enterprise Structures
  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.
- Define Legal Jurisdictions and Authorities
  Define information for governing bodies that operate within a jurisdiction.
- 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 don't need to record accounting transactions and thus don't need a ledger.
- Define Accounting Configurations

Define the accounting configuration that's the 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 your organization's enterprise structure, see the related topics. The use case in *Overview of Multiple Business Units in Sales* also can help you with a sample structure.

Related Topics

- Enterprise Structures Business Process Model
- Overview of Enterprise Structures

Set Business Unit Functions

A business unit can perform many business functions. A business function represents a business process, or an activity, that can be done by people working within a business unit. It describes how a business unit is used.

You must set up business unit functions in the Setup and Maintenance work area. If you've already done this as part of your business unit setup, then you can skip this step.

To set business unit functions:

1. Sign in as a setup user.
2. In Setup and Maintenance, Sales offering, go to: **Company Profile functional area** > **Assign Business Unit Business Function task**.
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.
   a. Select the arrow in the Business Unit field.
   b. Click the **Select and Add** option.
   c. Click **Apply and Go to Task**.
   d. In the Select and Add: Business Unit page, search for and select the BU that you're assigning a function to.
   e. Click **Select and Add** in the dialog window.
4. After you select a BU, the Assign Business Functions page appears. In the Business Unit Functions list, select the functions that apply to the business unit.
5. Click **Save and Close**.

Define Business Units

You define business units in the Setup and Maintenance work area. You can skip this step if you have already created business units when you set up your enterprise structure.

> **Note:** Remember, a single business unit is created for you when you initially set up your applications. The profile option, HZ_ENABLE_MULTIPLE_BU_CRM enables multiple-BU functionality for the sales applications, and it must be set to yes in order to be able to create additional BUs.

Here's how to create additional business units:

1. In Setup and Maintenance, Sales offering, go to: **Company Profile functional area** > **Manage Business Unit task**.
2. In the Manage Business Units page, select the create icon, or select **Create** from the Actions menu.
3. In the Create Business Unit page, in the **Name** field, enter a name for the BU.
4. Optionally, enter the **Manager** and a **Location**.
5. Ensure that the **Active** checkbox is selected.
6. Pick a **Default Set** for the BU. This is the reference data set that the BU will use.
7. Click **Save and Close**.

Overview of Managing Reference Data

Reference data is data that's associated with transactional objects, such as leads and opportunities. Reference data is organized into reference data sets.

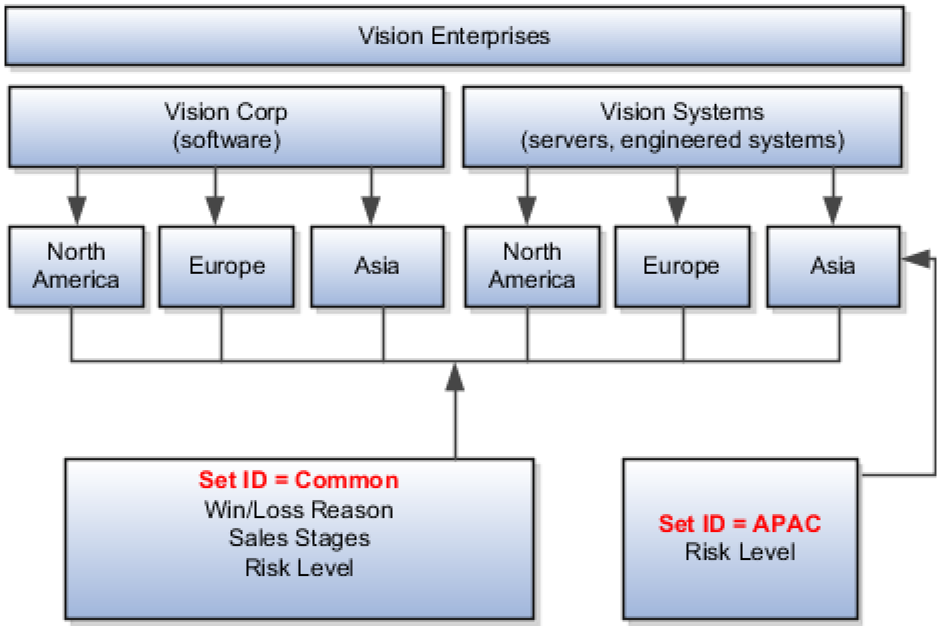
The reference data model lets companies separate transactional data so that it can be used across business units (BUs) or only for specific BUs. A data set called the Common set is predefined with the application. You can use the Common set for reference data that you want to share across business units. 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. Or, you can create more common sets or subsets to enable sharing reference data across several business units, without duplicating the reference data.

This illustration 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 can't access the data associated with the APAC BU, unless they're 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. To learn how you assign data sets to set-enabled data, see *Specify Business Unit Set Assignments*.

Create Reference Data Sets

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

Here's how to create reference data sets. In a later step, you assign them to business units. If you've 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**.

Specify Business Unit Set Assignments

If you're 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 might have already done this when setting up BUs. If so, then you can skip this step. If you do specify set assignments as described here, these settings override the setting in the business units edit page.

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

1. In Setup and Maintenance, Sales offering, go to: **Company Profile functional area** > **Manage Business Unit Set Assignment**.
2. 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.
3. Click **Save and Close**.

3 Sales Resources and Multiple Business Units

Overview of Sales Resources and Multiple BUs

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

Sales User Access to Transactional Data

Sales users can access object data across BU boundaries if they've valid access to the object by:

- Membership in the resource hierarchy
- The territories they belong to
- Team membership, for example, being on a sales team
- Being granted full access to the object

Users can access data in one or more of these ways. For example, users can have access to data through both team and territory membership, irrespective of the BUs they're associated with.

Access Through the BU Territory Dimension

Users can gain access to data when the territories they're members of have associations with BUs. Consider these scenarios:

- In a multiple BU environment, BUs are available as territory dimensions. In this case, the user's access to data is limited to objects which, when they were created, were assigned to the same BU that's assigned to the user's territory team.
- BUs also can be included as part of the coverage definition of a territory.

See also: *Multiple Business Units and Data Access to Sales Objects*.

Sales Administrator Access to BUs

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

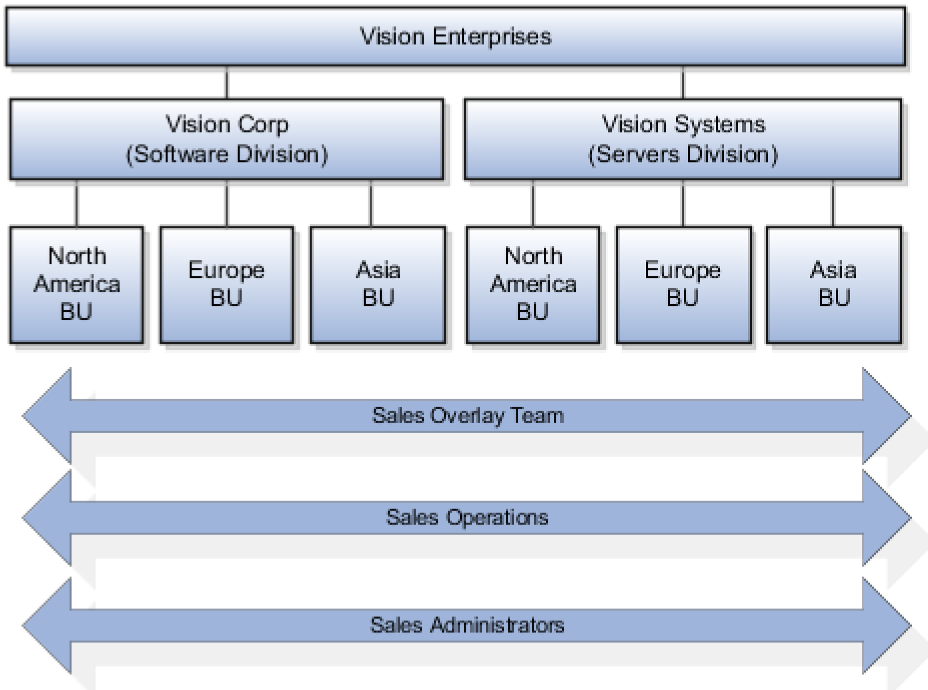
Use Case With Resources Across BUs

Sometimes, you might want certain types of users to have visibility into data across BUs. For example, you might want your overlay salesperson to have access to all BUs. Here are some examples:

- Associate overlay salespeople with all BUs and differentiate them using territory dimensions, such as geographic region of responsibility.
- Associate sales operations and sales administrators to one, many, or all 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. The diagram shows the following types of users having access to all BUs under both divisions: sales overlay team, sales operations, and sales administrators.



Understanding Associations Between Resource Organizations and BUs

You associate your resource organizations with BUs to align the organization members with specific BUs and thus control the transactional data that the users have access to. The first BU that you associate with a resource organization is automatically listed as the primary unit.

Making BU-resource organization associations also lets you:

- See the transactional details associated with the resource, such as opportunities, leads, and so on.
- If you're using Oracle Contracts: Control access to contracts that are based on BUs.

Sales users (sales resources) are associated with one or more BUs through their resource organization membership. When a sales user is created, you assign the user to a resource organization. The resource gains access to each BU that's mapped to that resource organization. For example, users access the transactional data associated with their primary BU. They might also have access to data in other BUs through their resource organization.

Make Associations Between Resource Organizations and BUs

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

Here's how to associate resource organizations with multiple BUs:

1. Sign in as a setup user.
2. In Setup and Maintenance, Sales offering, go to: **Users and Security functional area** > **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 BU.
4. In the Organization page, click the **Business Units** tab.
5. In the table, click the add row icon.
6. Select a BU from the **BU** list.
7. Click **Save**. The first BU you selected is set as the primary BU.
8. Similarly, select additional BUs from the **BU** drop-down list.
9. Click **Save and Close**.

Related Topics

- How Sales Users Gain Access to Sales Information

4 Multiple Business Units in Leads and Opportunities

Overview of Multiple Business Units in Leads and Opportunities

Using multiple business units (BUs) in leads and opportunities lets you offer different versions of the UIs and target downstream processes based on the context of BU. You can control what's shown in the lists of values and present certain attributes based on BU.

Here's a summary of the benefits:

- Using multiple BUs in leads and opportunities lets users associate leads and opportunities and related attributes with a specific BU.
- Depending on setup, users in one BU can't view leads and opportunities from another BU if they don't have the appropriate access.
- Using lookup types, you can present different drop-down lists for leads and opportunities in different BUs.
- For opportunities, you can set the win/loss and competitor attributes by BU.
- For leads, your qualification templates can be striped by BU.
- Use different work assignment styles according to BU.
- You can set profile options for both leads and opportunities and stripe them by BU.
- Set BU attributes to be visible in search fields.
- Report on data by BU.

Multiple Business Units in Leads and Opportunities Use Case

Let's say 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 and opportunity pages based on the different BUs.

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.

For opportunities, you can, for example, base certain attributes, such as, when closing an opportunity, the user is required to enter a win/loss reason. This segmentation would apply both at the opportunity and revenue item levels.

Use Set-ID-Enabled Lookup Types to Control Values in Lists

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

Some lookup types are "set-enabled". Set-enabled artifacts let you associate them with a BU and with reference data sets. Reference data sets let objects share reference data across BUs. For example, you can choose to have opportunity 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.

Use the Manage Set Enabled Lookups task from the Setup and Maintenance work area to access the lookup types related to leads.

Related Topics

- Example of a Set-Enabled Lookup

Set BU-Enabled Attributes for Leads and Opportunities

You use the Business Unit Properties page to set many of the lead and opportunity BU-enabled attributes.

> **Note:** Remember, when you set an option, such as a rule or template, at the BU level, the setting is effective for only the BU that you indicate.

Here's how to specify business unit properties for leads and opportunities:

1. Sign in as a setup user.
2. In the Setup and Maintenance work area, Sales offering, go to: **Company Profile functional area** > **Specify Sales Business Function Properties task**.
3. If a BU isn't 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** option.
   b. In the Business Unit list of values, click **Select and Add** and add the BU.
   c. After you've selected the BU, click **Apply and Go to Task**.
4. In the Specify Sales Business Function Properties page, set the options according to your business requirements.
5. Save your changes.

BU Attributes You Can Set for Leads

Here's what you can set in the Specify Sales Business Function Properties page for leads:

- Lead Templates
- Lead Conversion Mappings for leads and partners

BU Attributes You Can Set for Opportunities

Here's what you can set in the Specify Sales Business Function Properties page for opportunities:

- Default Sales Method
- Win/Loss Reason
- Require Competitor
- Territory-based Resource Assignment Style

Set-ID-Enabled Predefined Data for Leads

Here's the predefined data for leads that's set-ID-enabled:

BU-Enabled Lead Profile Options

This table describes the lead template and copy map BU-enabled profile options. None of the profile options have a default value.

Profile Option	Description
Qualification Assessment Template	Specify the qualification template to use for evaluating and qualifying leads.
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.
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.

Set-ID-Enabled Leads Lookup Types

This table shows the leads set-ID lookup types, the values, and the descriptions:

Lookup Type	Lookup Values	Description
Lead Qualification Budget Status	• Approved • Pending • Unknown	The approval status of a customer budget. The data is used to assess the lead qualification status.
Lead Rank	• Cold • Hot • Warm	Lead rank values used as a measure of lead quality and prioritization.
Lead Reassignment Reason	• No activity	Possible reasons specified for reassigning leads.

Lookup Type	Lookup Values	Description
	• Other • Workload	
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 • Sales visit • Social • Company website • Wireless message • Model-based prediction • Rules-based prediction	Source channel responsible for lead generation.
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.

Set-ID-Enabled Predefined Data for Opportunities

Here's the predefined data for opportunities that's set-ID-enabled:

Opportunity Lookup Types

Opportunity lookup types:

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

Additional set-ID-enabled opportunity attributes:

- Sales methods
- Sales statuses

BU-Enabled Profile Options for Opportunities

This table outlines the opportunity BU-enabled profile options:

Profile Option	Description	Default Value
Sales Method	Identify the default sales method the application picks when an opportunity is first created.	Standard Sales Process
Require Win/Loss Reason	Identify whether, when closing an opportunity, the user is required to enter a win/loss reason. Applies both at the opportunity and revenue item levels.	Yes
Require Competitor	Identify whether, when closing an opportunity, the user is required to enter a competitor. Applies both at the opportunity and revenue item levels.	Yes
Territory Based Resource Assignment Style	Identify 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.	All

Profile Option	Description	Default Value
	Note: When you set a profile option at the BU level, the profile option setting takes precedence for the BU. However, the **Lock Assignment** checkbox, if selected, takes precedence and prevents a salesperson from being automatically removed from an opportunity through the assignment engine.	

Add the Business Unit Field to the Edit Lead Page

After you modify the UI, salespeople can associate a business unit (BU) with their leads using a drop-down list in the Edit Lead page. You enable the drop-down list using Application Composer.

Add the Business Unit Field to Leads

Here's how to add the Business Unit field to the Edit Lead page:

1. Ensure you're working in an active sandbox.
2. Navigate to **Application Composer**.
3. Expand Standard Objects and navigate to **Sales Lead** > **Pages**.
4. In the Sales Leads: Pages page, ensure that the **Application Pages** tab is active.
5. In the Details Page Layouts region, click the duplicate layout icon to duplicate and edit an existing layout.
6. In the Duplicate Layout dialog window, enter the new layout name and select the existing page layout to duplicate.
7. Click **Save and Edit**. Your new Details Layout page appears, with the name of the new layout in the page title.
8. In the Summary subtab region, click the edit icon.
9. 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.
10. Click **Save and Close**.
11. Click **Done** in the Details Layout: Default custom layout page.
12. Validate the change by navigating to the Edit Lead page and verify that you can see the Business Unit field.

    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 user with the Sales Representative role. The Sales Administrator user also will work for testing.
13. Publish the sandbox.

The Business Unit field is now available to sales users in the Edit Lead page.

Related Topics

- Overview of Sandboxes

Add the Business Unit Field to the Edit Opportunity Page

After you modify the UI, salespeople can associate a business unit (BU) with their opportunities using a drop-down list in the Edit Opportunity page. You enable the drop-down list using Application Composer.

Add the Business Unit Field to Opportunities

Here's how to add the Business Unit field to the Edit Opportunity page:

1. Ensure you're working in an active sandbox.
2. Navigate to **Application Composer**.
3. Expand Standard Objects and navigate to **Opportunity** > **Pages**.
4. In the Opportunity: Pages page, ensure that the **Application Pages** tab is active.
5. In the Details Page Layouts region, click the duplicate layout icon to duplicate and edit an existing layout.
6. In the Duplicate Layout dialog window, enter the new layout name and select the existing page layout to duplicate.
7. Click **Save and Edit**. Your new Details Layout page appears, with the name of the new layout in the page title.
8. In the Summary subtab region, click the edit icon.
9. 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.
10. Click **Save and Close**.
11. Click **Done** in the Details Layout: Default custom layout page.
12. Validate the change by navigating to the Edit Opportunity page and ensuring that you can see the Business Unit field.

    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 user with the Sales Representative role. The Sales Administrator user also will work for testing.
13. Publish the sandbox.

The Business Unit field is now available to sales users in the Edit Opportunity page.

Related Topics

- Overview of Sandboxes

Change the Business Unit for a Subset of Opportunities

Salespeople can update the business unit (BU) on an opportunity. They can also update the set-enabled lookup values on the opportunity and revenue lines. You can add new specific or common set values for sales methods and stages.

You can modify set-enabled lookups for these opportunity tasks:

- Manage Levels of Risk
- Manage Strategic Values
- Manage Decision Levels

- Manage Deal Horizons
- Manage Win/Loss Reasons
- Manage Opportunity Revenue Types

You can do the same for:

- 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.

Change Lookup Values for Opportunities

Here's how to create specific values or enable or disable existing lookup values for opportunities. You also set up the sales status, sales method, and sales stage before you select your business unit to apply the changes.

1. In Setup and Maintenance, go to: **Sales offering** > **Opportunities functional area** > **Define Opportunity Management Lookups task**.
2. On the Define Opportunity Management Lookups page, select the opportunity task that you want.
3. Add a new set-enabled lookup value or either enable or disable an existing lookup value.
4. After the setup is done for the task lookups, navigate to Setup and Maintenance and go to: **Sales offering** > **Opportunities functional area** > **Manage Sales Status task**
5. 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.
6. Next, go to the **Manage Sales Methods and Sales Stages** task.
7. Add a new sales method and sales stage for the sales method that you want.
8. After you complete the setup related to lookups, sales statuses, sales methods, and sales stages, navigate to the **Define Business Units** task.
9. Click the **Manage Business Unit Set Assignment** task.
10. In the Reference Data Set Code column, for each object, set the business unit.
11. Click **Save and Close**.

Repeat step these steps for each new individual business unit you've added.

Related Topics

- How do I update existing setup data?

Enable Lead Territory Assignment by Business Unit

To use business units (BUs) in territory assignment, you must set up a mapping between the lead BU field and the territory dimension, Business Unit.

For example, you have a scenario where your organization:

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

In this example, let's say the lead is contained in BU1. In this case, set up the 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.

Set Up the Lead Business Unit Mapping

Here's how to set up the lead business unit mapping:

1. In Setup and Maintenance, go to: **Sales offering** > **Leads functional area** > **Manage Sales Lead Assignment Objects task**.
2. On the Manage Sales Lead Assignment Objects page, find 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 these active mapping sets for the Sales Lead object you want:
    - **Mapping Set 1**
    - **Mapping Set 2**
    - **Mapping Set 3**
    - **Mapping Set 4**
    - **Mapping Set 5**
7. In the **Mapping Set: Mappings** region, find and select the `BUnit` dimension function code.
8. Deselect the **Inactive** checkbox 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.

Enable Opportunity Territory Assignment by Business Unit

You can configure the application to assign opportunities based on the BU.

To use BU in territory assignment, you must activate the assignment mapping between the opportunity revenue BU field and the territory dimension, Business Unit.

For example, you have a scenario where your organization:

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

In this example, let's say the lead is contained in BU1. In this case, set up the assignment mapping so that territory assignment only matches the BU1 territories (along with any matching dimensions). Matching dimensions might include geography, product, account type, and sales channel.

Set Up the Opportunity Revenue Business Unit Mapping

Here's how to set the up the opportunity revenue BU mapping:

1. In Setup and Maintenance, go to: **Sales offering** > **Opportunities functional area** > **Manage Sales Assignment Manager Object task**.

2. In the **Name** column of the Manage Sales Assignment Manager Objects page, find 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, find and select the `BUnit` dimension function code.
8. Click the edit icon on the table to go into edit mode.
9. Deselect the **Inactive** checkbox 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.

Migrate Lead and Opportunity BU Data

There might be times when you need to move all leads or opportunities from one business unit to another.

For example, you could have a new business unit taking over all opportunities from another business unit. All opportunities would have to be updated from the old business unit to the new business unit. The migration is easy to do by running the Migrate Lead and Opportunity Business Unit Data scheduled process.

1. Navigate to **Tools** > **Scheduled Processes**.

   Alternatively, run the process from the **Migrate Lead and Opportunity Business Unit Data** task in Setup and Maintenance.
2. Click **Schedule New Process**.
3. Search for the **Migrate Lead and Opportunity Business Unit Data** process.

   > **Tip:** You may need to search for the process in the search and select window available by clicking the **Search** link at the at the bottom of the Name list on the main search window.

4. Select your options:

   - **Business Object:** Opportunity or Lead
   - **From Business Unit:** Business unit that you want to migrate data from
   - **To Business Unit:** Business unit that you want to migrate data to
5. Submit the process.

Related Topics

- What are scheduled processes?

5 Multiple Business Units in Territories

Territories Defined with Business Units

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.

When you implement territories, enable the Business Unit dimension. When you build your territory hierarchy, you can use the business unit dimension in the territory coverage. You always have just 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.

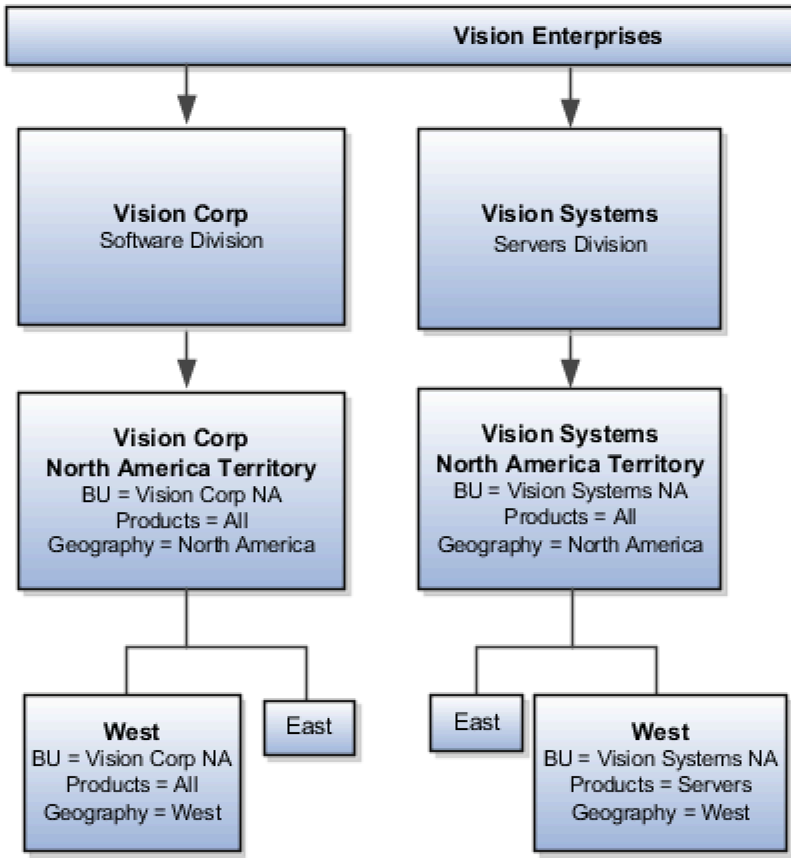
Tip: Assignment of sales accounts ignores the Business Unit dimension.

Use Case

In this use case you have one territory hierarchy with one top-level territory. The Vision Enterprises territory has this structure:

- 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.

This chart shows the use case. Vision Enterprises has two divisions, Vision Corporation and Vision Systems. Each division has three business units, and therefore three first-level territories defined by these business units. The overlay territory is defined with all business units, and the Vision Corporation North America territory defined by the Vision Corp NA BU. The Vision Systems North America territory is 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.



6 Multiple Business Units in Contracts

Overview of Multiple Business Units in Contracts

You can associate contracts with a business unit (BU), allowing them to be restricted by a business unit . You can also specify some Contract Terms Library components at the BU level.

For example, you can enable clause and template adoption at the BU level.

> **Note:** Ensure you set the common CX profile options to enable BUs. See *Set Up Common CRM Business Unit Profile Option* for more information.

Here are the high-level steps to set up multiple BU functionality in Contracts:

1. Set business unit functions
2. Create a contracts organization
3. Associate contract organization with business units
4. Associate the organization with the user

See *Define Business Units, Assign Business Function, and Assign Ledger and Legal Entity* for more information.

Overview of Contracts Business Functions Setup

You can specify many business function settings for customer contracts in a specific business unit (BU).

For these tasks, you use the Specify Customer Contract Management Business Function Properties task, available by navigating to Setup and Maintenance work area and searching on the task name.

The selections you make for these business functions impact how Oracle Enterprise Contracts acts during contract authoring.

Here's what you can do:

- Enable related accounts
- Set currency conversion details

  > **Note:** You must select a default currency in the customer or supplier business function properties page, if it's not already populated automatically from the ledger assigned to the BU in the assign business function setup task.

- Manage project billing options
- Set up clause numbering
- Set up the Contract Terms Library

  The setup options available for the Contract Terms Library are applicable to both customer and supplier contracts, and are described in *Contract Terms Library Business Unit Setup*.

Enabling Related Customer Accounts

Contract authors can specify bill-to, ship-to, and other accounts for the parties in a contract. Enable the related customer accounts option if you want accounts previously specified as related to the contract party to be available for selection.

Managing Currency Conversion Options

If your organization plans to transact project-related business in multiple currencies, then select the multicurrency option. This allows a contract author to override a contract's currency, which is derived from the ledger currency of the BU. It also enables the contract author to specify currency conversion attributes to use when converting from the bill transaction currency to the contract currency and from the invoice currency to the ledger currency.

In the Bill Transaction Currency to Contract Currency region, enter currency conversion details that will normally be used, by all contracts owned by this BU, to convert transaction amounts in the bill transaction currency to the contract currency. Newly created contracts contain the default currency conversion values, but you can override the values on any contract, if needed.

In the Invoice Currency to Ledger Currency region:

- Enter invoice transaction conversion details if the invoice and ledger currencies can be different.
- Enter revenue transaction conversion details if the revenue and ledger currencies can be different for as-incurred and rate-based revenue.

Managing Project Billing Options

The options available for selection in the Project Billing region control the behavior of project invoicing and revenue recognition for contracts with project-based work. Project billing can act differently for external contracts (customer billing) or intercompany and interproject contracts (internal billing).

Set these options, which apply to all contracts:

- Select the **Transfer Revenue to General Ledger** option if you want to create revenue accounting events and entries, and transfer revenue journals to the general ledger. If this option isn't selected, then revenue can still be generated, but won't be transferred to the general ledger.
- Indicate if a reason is required for credit memos that are applied to invoices.

These options exist in two sets - one for customer billing and a second for internal billing:

- Select an invoice numbering method, either **Manual** or **Automatic**. The invoice numbering method is the method that Oracle Fusion Receivables uses to number its invoices, upon release of draft invoices from Project Billing.
  - If the invoice numbering method is **Manual**, then select an invoice number type, which sets the type of Receivables invoice numbers that are allowed. Valid values are **Alphanumeric** and **Numeric**.
  - If the invoice numbering method is **Automatic**, then enter the next invoice number to use when generating Receivables invoice numbers.
- Select the Receivables batch source to use when transferring invoices to Receivables.

Set this option only for customer billing:

- Indicate if you want contract authors to manually enter the Receivables transaction type on the customer contracts they create.

Managing Clause Numbering

You can choose to number clauses manually or automatically.

If you choose the automatic numbering method, you must select a determinant level for the numbering. You must then select the appropriate clause sequence category from document sequences that you set up for this numbering level.

Configure Contract Management Business Functions

Here are the steps to configure contract management business functions:

1. Navigate to **Define Contracts Common Configuration** > **Define Contract Management Business Function Configuration**.
2. Click **Select** in the Selected Scope column for the Specify Customer Contract Management Business Function task.
3. Click **Select and Add** in the dialog to select a business unit, then **Apply and Go To Task**.
4. Select the BU that you created and click **Save and Close** to save the task list scope to the BU.
5. On the Specify Customer Contract Management Business Function Properties page select the default currency, enter the required information in the Terms Library region and click **Save and Close**. These settings are common for standalone sell and partner program enrollment type of contracts. Ignore the other values in the page for now.
6. Open the Specify Supplier Contract Management Business Function Properties task.
7. Enter the required information and click **Save and Close**.

Define Business Units, Assign Business Function, and Assign Ledger and Legal Entity

Here are the steps to define a business unit (BU) and assign a business function, ledger, or legal entity:

1. In the Setup and Maintenance work area, create an implementation project that includes the Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Business Units for Enterprise Contracts, and **Manage Business Unit** tasks.
    a. Click **Create**.
    b. Enter the required information on the Create Business Unit page. Select **Create** from the Default Set drop-down list.
    c. Create a reference data set and click **OK**.
    d. Select the reference data set created from the Default Set drop-down list and **Save and Close**.
2. Navigate to **Define Common Applications Configuration for Enterprise Contracts**, **Define Enterprise Structures for Enterprise Contracts**, **Define Business Units for Enterprise Contracts**, and click **Select** for the task Assign Business Unit Business Function to select the business unit you created as the task list scope.

   a. Click **Select and Add** in the dialog to set the BU you created as the task list scope.
   b. Select the task **Assign Business Unit Business Function** and click **Go to Task**.
   c. In the Assign Business Functions page, based on requirements, verify that the checkbox against Customer Contract Management and Procurement Contract Management is selected.
   d. Enter the required information and **Save and Close**. Click the up arrow, and select Enterprise Contracts to go to the main folder structure.

      Note: If the implementation doesn't need to create financial transactions from contracts, assigning a primary ledger and default legal entity in the Assign Business Function page is optional. For service contracts, it isn't optional.

3. Navigate to **Define Common Applications Configuration for Enterprise Contracts**, **Define Enterprise Structures for Enterprise Contracts**, **Define Business Units for Enterprise Contracts**, and open the **Manage Business Unit Set Assignment** task. You can update or override the reference data set code for a particular reference data object.

Note: Anytime you create a new BU, be sure to run the Adopt Global Clauses for a New Business Unit scheduled process. Otherwise, new clauses aren't automatically adopted into the new business unit.

Supplier Contracts Business Unit Setup

You can specify various business function settings for supplier contracts in a specific business unit using the Specify Supplier Contract Management Business Function Properties task, available by selecting Setup and Maintenance from the Navigator and searching on the task name.

The selections you make for these business functions impact how the Contract Terms Library behaves during supplier contract authoring.

Note: The customer must select a default currency in the customer or supplier business function properties page, if not automatically populated from the ledger assigned to the business unit in the assign business function setup task.

Managing Contract Terms Library Setup Options

The setup options available for the Contract Terms Library are applicable to both customer and supplier contracts, and are described in the business unit setup topic for the Contract Terms Library. That topic is available as a related link to this topic.

Set Up Supplier Ship-to Organization, Ship-to Location and Bill-to Location

To set up ship-to organization, create an Inventory Organization by using these steps:

1. Navigate to **Setup and Maintenance**.
2. Click Search in the Tasks side panel and type **Manage Inventory Organizations**. Then, select it from the options listed.
3. Click **Create** in the results table.
4. Enter **Name** and **Organization**, and select **Management Business Unit** and **Legal Entity** information from the Drop-down list. Then, click **Next**.
5. In the General tab, select **Schedule** and **Item Master Organization** information. Click **Save and Close**.

To set up a ship-to and bill-to location, create an Inventory Organization Location by using the following steps:

1. Search for **Manage Inventory Organization Locations** in the Tasks side panel.
2. Click **Manage Inventory Organization Locations** on the Search page.
3. Click **Create** in the results table.
4. Enter any required fields and select **Inventory Organization** in the drop-down list.
5. Click **Submit**.

Contract Terms Library Business Unit Setup

You can specify a wide variety of Contract Terms Library settings for customer or supplier contracts within each business unit by using the Specify Customer Contract Management Business Function Properties or the Specify Supplier Contract Management Business Function Properties tasks.

These tasks are available in the Setup and Maintenance work area as part of the Enterprise Contracts offering in the Enterprise Contracts Base functional area.

For the Contract Terms Library in each business unit, you can:

- Enable clause and template adoption.
- Set the clause numbering method.
- Set the clause numbering level for automatic clause numbering of contracts.
- For a contract with no assigned ledger or legal entity, set the document sequence to Global or Business Unit level.
- Enable the Contract Expert enabling feature.
- Specify the layout for printed clauses and contract deviation reports.

Enable Clause Adoption

Do this to use clause adoption in your implementation:

1. Specify a global business unit

   Designate one of the business units in your organization as the global business unit by selecting the **Global Business Unit** option. This makes it possible for the other local business units to adopt and use approved content from that global business unit. If the **Global Business Unit** option isn't available for the business unit you're setting up, it means you've already designated a business unit as global.
2. Enable automatic adoption

   If you're implementing the adoption feature, you can have all the global clauses in the global business unit automatically approved and available for use in the local business by selecting the **Autoadopt Global Clauses** option. If you don't select this option, the employee designated as the Contract Terms Library Administrator must approve all the global clauses, before they can be adopted and used in the local business unit. This option is available only for local business units.
3. Specify the administrator who approves clauses available for adoption

   You must designate an employee as the Contract Terms Library administrator if you're using adoption. If you don't enable automatic adoption, then the administrator must adopt individual clauses or localize them for use in the local business unit. The administrator can also copy over any contract terms templates created in the global business unit. The clauses and contract terms templates available for adoption are listed in the administrator's Terms Library work area.

4. Adopt global clauses for new business unit

   If you're creating a new local business unit and have to adopt existing global clauses, run the Adopt Global Clauses for a New Business Unit process. See *How can I Manage Enterprise Scheduler Processes for Enterprise Contracts?* for more information.

Set Up Clause Numbering Options

You can set up automatic clause numbering for the clauses in the business unit by selecting Automatic in the Clause Numbering field and setting the clause numbering level. Then select the appropriate clause sequence category for the specified numbering level. You must have previously set up document sequences for the document sequence categories of global, ledger, and business unit. If clause numbering is manual, contract terms library administrators must enter unique clause numbers each time they create a clause.

You can choose to display the clause number in front of the clause title in contracts by selecting the **Display Clause Number in Clause Title** option.

Set Up Consistent Clause Numbering

When you skip numbering and suppress the title for a clause or section, the numbering format might look different when you download the contract. You get the difference in numbering format because your downloaded contract has the numbering format of Microsoft Word. To enable Microsoft Word numbering format for your contract in the Enterprise Contracts UI, you must set the **Consistent Microsoft Word Numbering for Contract Terms Enabled** profile option as **Yes**.

If this profile option is set as **No**, you might see inconsistent numbering when you download the contract as the Microsoft Word document.

Here are the steps to enable the profile option:

1. In the Setup and Maintenance work area, go to the **Manage Administrator Profile Values** task.
2. On the Manage Administrator Profile Values page, search for and select the **Consistent Microsoft Numbering for Contract Terms Enabled** profile option.
3. Set the profile option to **Yes**.
4. **Save and Close**.

Enable Contract Expert

Select the **Enable Contract Expert** option to use the Contract Expert feature in a business unit. This setting takes precedence over enabling Contract Expert for individual contract terms templates.

Specify Printed Clause and Deviations Report Layouts

For each business unit, you can specify the Oracle Analytics Publisher RTF file that serves as the layout for:

- The printed contract terms

  Enter the RTF file you want used for formatting the printed clauses in the **Clause Layout Template** field.

- The contract deviations report

  The RTF file you select as the **Deviations Layout Template** determines the appearance of the contract deviations report PDF. This PDF is attached to the approval notification sent to contract approvers.

Contracts Security Setup

The Contracts security model provides different levels of access to administrative and nonadministrative users. Administrative users can edit contracts in all the business units (BUs) they're authorized in.

BUs and team member security can determine which contracts a user has access to. Contract security works this way:

- You must be designated as a sales resource to be able to create or edit a contract.
- Only a sales resource or sales resource organization can be team members of a contract.

The BUs that a user can access is based on the resource organization the user is mapped to as a resource.

Here's how administrative and nonadministrative user access to contracts is determined in the UI:

- Administrative users can create or edit contracts in all the BUs they're authorized in. Administrative users have Contracts
- Nonadministrative users can create contracts in all the BUs they're authorized in. They also have access to contracts based on team membership, as follows:
  - They can view and edit contracts of other BUs provided they're team members in those contracts.
  - All the managers of the organization in the upward resource hierarchy of a team member can also access the contract. For example, if User A is the manager of User B, User A will be able to edit the contract of User B. User A can access this contract irrespective of whether they're listed as a contract team member.
  - All the users below the hierarchy are also authorized on the contract.

> **Tip:** The real power of team security can be seen when you're talking about users who don't have access to particular BUs. For example, take User C, who doesn't have access to the BU that User D is using. Add User C as a team member of the contract. User C can access the contract, even though he doesn't have access to the BU.

This table illustrates the user access scenario:

Contract Privilege	Administrative User	Non-Administrative User
Create contracts	Can create contracts in all the BUs that the user is authorized in, based on their resource/ resource organization mapping.	Can create contracts in all the BUs that the user is authorized in, based on their resource/ resource organization mapping.
Edit contracts	Can edit all the contracts of the BUs that the user is authorized to.	Can edit all the contracts in which the user is a team member.

Contract Privilege	Administrative User	Non-Administrative User
		Note: • Even if a user is authorized in a BU, the user might not be authorized for all contracts in that BU. • Users can access contracts even if they're not authorized in its BU, provided they're on the contract team.

CAUTION: Be sure to give team member-type roles to non-administrative users and not any roles that give contract administrator or contract manager-type privileges. Otherwise, users will be able to see contracts that are created in other BUs.

Manage Contract Visibility in Multiple Business Units Setup

For security reasons, you can restrict the contract visibility based on a selected user and BU.

In addition, you can associate contracts with a BU, allowing them to be restricted by a BU.

Here are the overall steps:

1. Create a contracts organization.
2. Associate the contracts organization with a BU.
3. Associate the contracts organization with a user.

Create a Contracts Organization

1. Sign in as a setup user and go to Setup and Maintenance.
2. Search for and select the **Manage Internal Resource Organizations** task.
3. On the Manage Internal Resource Organizations page, click the create icon.
4. Select **Option 2: Create New Organization**, and then click **Next**.
5. Enter the name of the contract organization in the **Name** field. This name is shown in the resource directory. Here are a few things to keep in mind when naming contracts organizations:
    - Each contract organization name must be unique.
    - The names don't have to correspond to any formal organization in your enterprise. The names are only used to create a resource directory.
    - Don't use the name of a manager as the organization name, because you might need to reassign the organization to someone else later.
6. In the Organization Usages region, click the add icon and select **Contracts Organization**.
7. Click **Finish**.

Associate a Contracts Organization with a Business Unit

1. Sign in to the application as an administrator or as a setup user.

2. In the Navigator, select **Resource Directory**.
3. On the Resource Directory page, click the **Tasks** panel tab.
4. In the Resource Organizations region, click **View Organizations**.
5. On the View Organizations page, search for the organization that you created.
6. In the Search Results region, click the link for the organization.
7. Select the **Business Units** tab.
8. Click **Add Row**.
9. Select the BU from the drop-down list.

   Note: The first BU that you associate the contracts organization with becomes the primary BU. If you associate the organization with more BUs, you can change the primary BU as needed.

10. To add more BUs, click **Save**, and then click **Add Row**.
11. After you add the BUs, click **Save and Close**.
12. Click **Done**.

Note: If you enable multiple BUs, be sure that each user is associated with a contracts organization, and the contracts organization is associated with one or more BUs.

Associate the Organization with a User

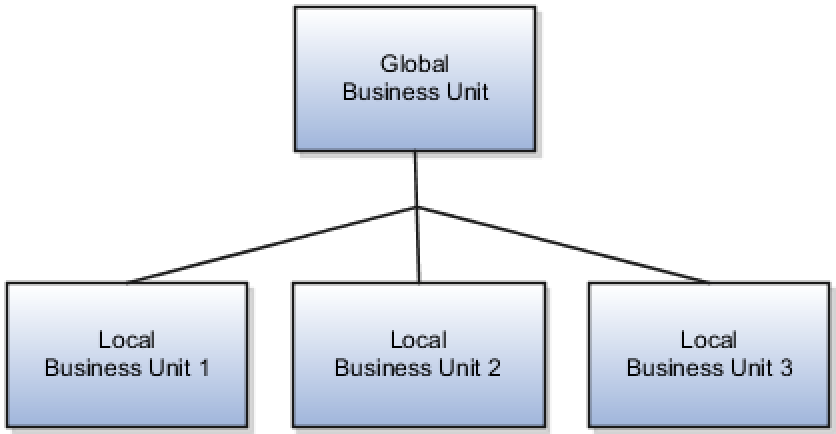
Use the Manage Users task in Setup and Maintenance to associate the organization to the user. While creating a new user or editing an existing user, navigate to the Resource Information section, search and select the contracts organization in the **Organization** drop-down list.

How Business Unit Affects Clauses and Other Objects in the Library

For some Contract Terms Library objects, the business unit (BU) that's set during contract creation restricts where these objects can be used. Objects affected include clauses, contract terms templates, and Contact Expert rules.

Objects created in a local BU can only be used in that local BU. Objects created in a global BU can be adopted or copied over to other BUs provided they're specified as global. This topic details the impacts of the BU choice on the different library objects.

The following figure shows a hypothetical implementation with four business units: one global business unit and three local business units. You can designate one business unit as global during Business Unit setup. The other business units are local business units.



How Business Units Affect Terms Library Objects

This table details how the selection of a BU affects different objects in the Contract Terms Library.

Terms Library Object	Impact of Business Unit
Clauses	Different restrictions apply depending on BU type: • Local Business Unit Use restricted to the local BU where it's created. • Global Business Unit Clauses created in the global BU, can be made available to other BUs by selecting the Global checkbox. Local BUs can either adopt the clause as is or localize it.
Contract terms templates	Different restrictions apply depending on BU type: • Local Business Unit Use restricted to the local BU where it's created. • Global Business Unit Contract terms templates created in the global BU, can be made available to other BUs by selecting the Global checkbox. Local BUs can copy the templates to their BUs.
Contract Expert rules	Use of rules is restricted to the BU where you create them.
Contract Expert questions	Use of questions is restricted to the BU where you create them.
Contract Expert constants	Use of constants is restricted to the BU where you create them.
User variables	No effect.

Terms Library Object	Impact of Business Unit
	User variables created in any BU and are available across all BUs.
Contract terms sections	No effect. Contract terms sections can be created in any BU and are available across all BUs.
Clause numbering schemes	No effect. Numbering schemes can be created in any BU and are available across all BUs.

How does a Contracts user get access to a business unit?

A contract user is first created as a resource and mapped to a resource organization. Because each resource organization is mapped to one or more business units (BUs), the user gets access to the BUs that are mapped to the resource organization.

For example, if the user-to-resource organization mapping is as seen in table 1, and the resource organization-to-BU mapping is as seen in table 2, then the users will get BU access as seen in table 3:

Table 1:

User/Resource	Resource Organization
Sophie Black	Resource Org 1
Olivia Turner	Resource Org 2
Bala Gupta	Resource Org 3
Mark Quinn	Resource Org 4

Table 2:

Resource Organization	Business Units
Resource Org 1	Vision Operations
Resource Org 2	Vision Services

Resource Organization	Business Units
Resource Org 3	Vision Services
Resource Org 4	Vision Operations Vision Services

Table 3:

User/Resource	Business Units
Sophie Black	Vision Operations
Olivia Turner	Vision Services
Bala Gupta	Vision Services
Mark Quinn	Vision Operations Vision Services

How can existing contract users not created as resources get business unit access?

Existing contract users who weren't created as resources can get business unit (BU) access if you make them resources by using the Identify Resource feature.

You can use the Identify Resource feature to search for a user and identify the user as a resource through the Add as Resource option. While adding the user as a resource, the user can be associated with a resource organization. Once a user is mapped to a resource organization, the user gets access to the BU mapped to the resource organization.