Oracle Fusion Cloud Sales Automation

How do I enable the Generate Account Description feature in Sales for Redwood?

25B

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Author: Jiri Weiss

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1 Feature and Setup Overview

How to Use This Playbook

Use this playbook to enable and use the Generate Account Description feature.

- Familiarize yourself with the feature by reading the *About the Generate Account Description Feature* topic.
- Follow the setup process outlined in the *Setup Overview for Generate Account Description Feature*. Setup details are linked from each step.
- You can test and learn how to use the feature by following the instructions in the topic *Generate Account Descriptions*.

About the Generate Account Description Feature

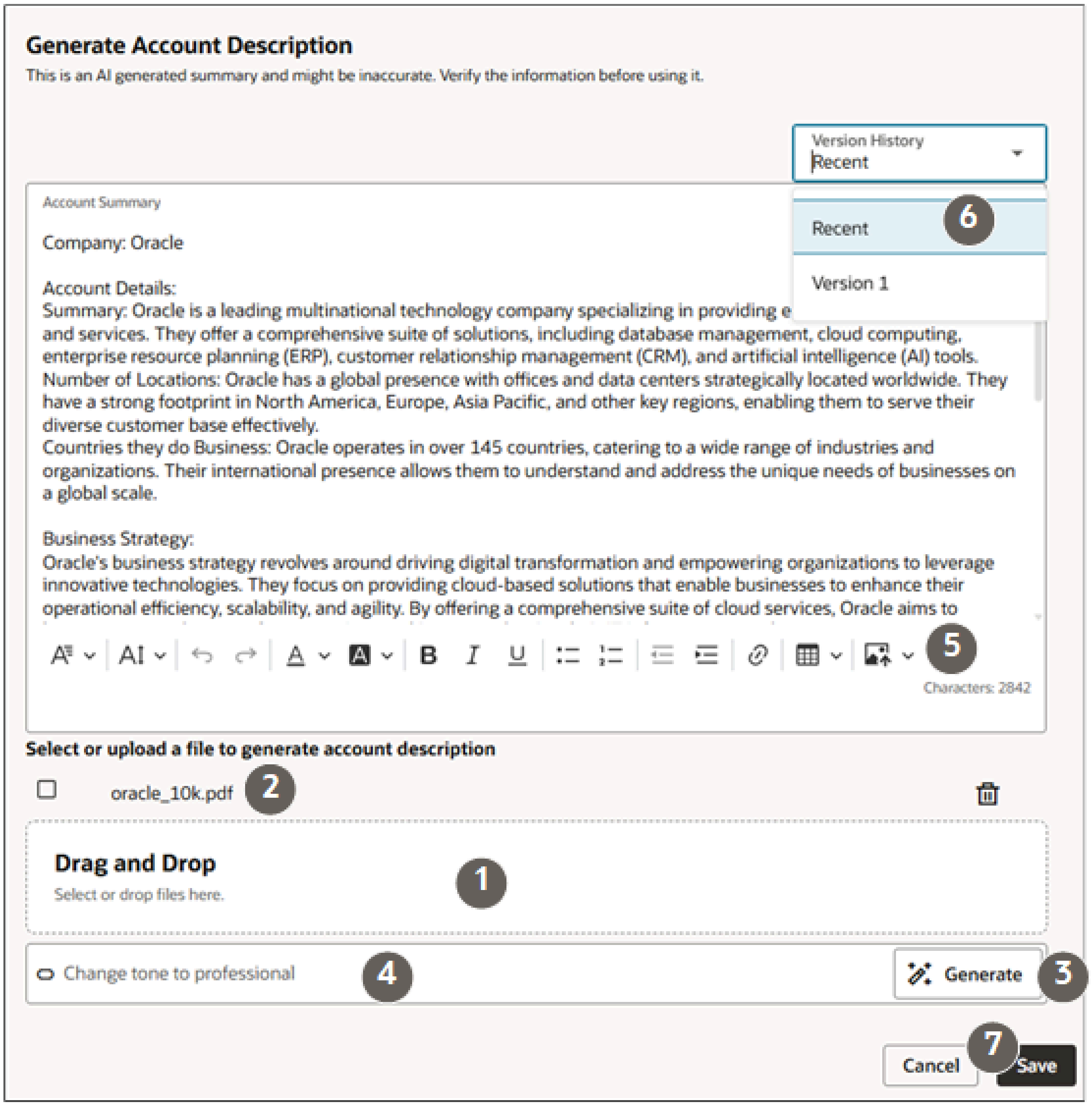
Use Generative AI to generate account descriptions from PDF documents, such as a 10-K financial disclosure documents, to aid with account planning activities.

The feature includes the Generate Account Description UI for generating and editing descriptions, as well as a companion smart action that you enable during setup. The generated descriptions are saved in a long-text field, which you can display to the sales team in a custom panel on the account details page, for example.

Entering **Generate Account Description** in the Ask Oracle bar on the Account details page opens the UI in a drawer. Here's an annotated screenshot describing the different UI functions.

To use the feature, users must be provisioned with the Sales Administrator job role or any other role that has the Use Generative AI Features in Sales (ZCA_USE_GENAI_IN_SALES_PRIV) privilege.

Callout	Description
1	Upload one or more PDFs that you want to use as the source of your description, such as a company 10-K report.
2	Select the PDFs that you want to use to generate the description. If you didn't upload or select any documents, the description is generated by the LLM from publicly-available information it's been trained on.
3	Click the **Generate** button. Each time you click the button, the application generates a version of the description.
4	Fine-tune the text. You can ask the LLM to proofread, add bullets, shorten the text, or change the tone, for example.
5	You can edit and format the text yourself.
6	You can generate multiple versions of the description and copy and paste between the versions you generate. The versions are available until you save.
7	Clicking **Save** saves the Recent version.



Setup Overview

Here's an overview of the steps to enable the Generate Account Descriptions feature.

Step	Description	More Information
1	On the Intelligence in Sales Feature Opt-in page, enable **Use Generative AI Features in Sales**. You must opt in through **Navigator** > **My Enterprise** > **Offerings** rather than through the Opt-in page in Setup and Maintenance.	*Enable Generative AI Features in the Sales Offering*

Step	Description	More Information
2	In a sandbox, open Application Composer, click **Smart Actions** , and enable the **Generate Account Description** smart action.	*Enable the Generate Account Description Smart Action*
3	The account description text is stored in a long-text field that you create in Application Composer.	*Create a Long Text Field for the Descriptions*
4	Add the long-text field to the Summarize UI layout in Oracle Visual Builder Studio.	*Configure the Layout in VB Studio*
5	You can fine-tune the prompt used by the LLM to call out different types of information in the description it generates.	*Modify the GenAI Prompt*
6	Generate a description to test your setup.	*Generate Account Descriptions*

2 Setup Step Details

Enable Generative AI Features in the Sales Offering

Here's how to enable the Gen AI features for the Generate Account Description feature.

1. Open Offerings. (**Navigator** > **My Enterprise** > **Offerings**).
2. Click the **Sales** offering.
3. Click the **Opt-in Features** button.
4. On the Opt-in page, select the **Sales** offering.
5. Scroll down to **Intelligence in Sales** and click **Edit** (the pencil icon).
6. On the Intelligence in Sales Feature Opt-in page, make sure that the **Use Generative AI Features in Sales**, **Status** column displays **Enabled**.
7. Click **Save**.

Enable the Generate Account Description Smart Action

Here's how to enable the Generate Account Description smart action.

1. Create and enter a publishable sandbox with Application Composer.(**Navigator** > **Configuration** > **Sandboxes**).
2. Open Application Composer from the sandbox.
3. In Application Composer, **Common Setup**, click **Smart Actions**.
4. Search for **Generate Account Description**.
5. In the **Enabled** column, select **Yes**.
6. Publish the sandbox.

Create a Long Text Field for the Descriptions

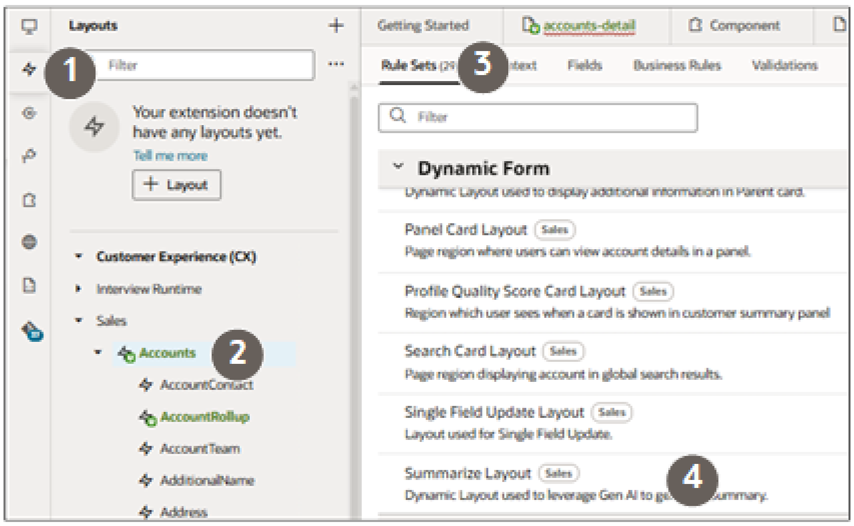
Here's how to create the long-text field to save the account descriptions.

1. Enter a sandbox with Application Composer.
2. Open Application Composer.
3. In the left pane, expand **Standard Objects** > **Account**.
4. Expand the **Account** node.
5. Click **Fields**.
6. In the Fields page, click **Create Custom Field**.
7. On the Select Field Type window, select **Long Text**.
8. In the **Display Label** field, enter **Account Description**.
9. Make sure the **Updatable** and **Include in Service Payload** checkboxes are selected.
10. Click **Save and Close**.
11. Click the sandbox name and select **Publish**.
12. On the Sandbox Details page, click **Publish** again.

Configure the Layout in VB Studio

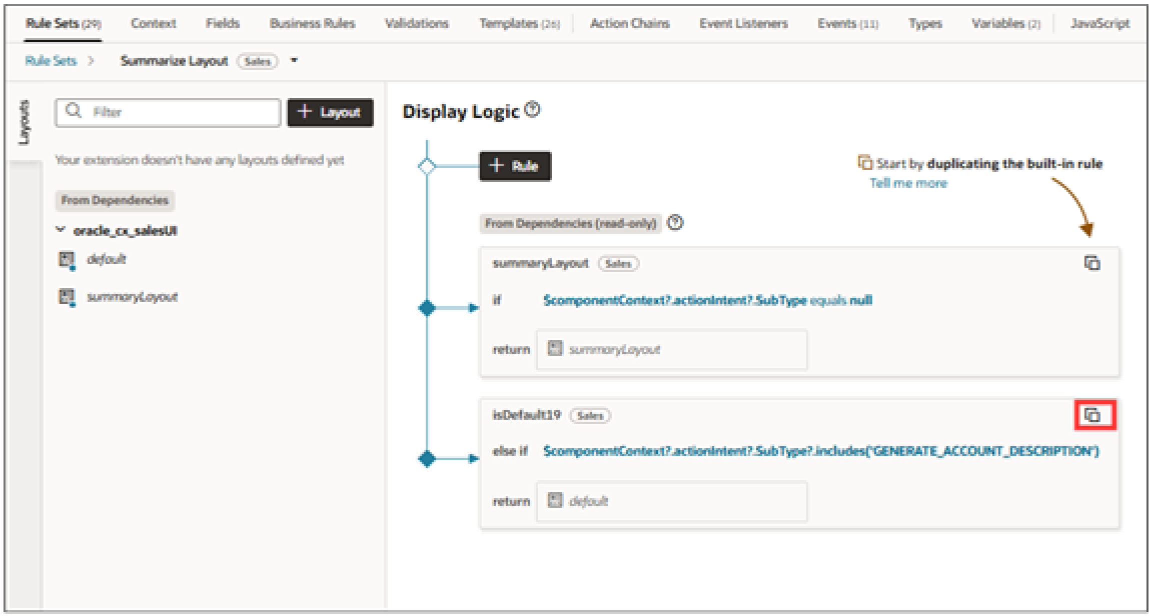
You must perform the following setup in Oracle Visual Builder Studio to make it possible to save the generated descriptions to the long-text field of your choice.

1. In Oracle Sales for Redwood, open the Account details page for an account.
2. Open VB Studio (**Settings and Actions** > **Edit Page in Visual Builder Studio**).
3. Click the **Layout** tab.
4. Expand the **Customer Experience (UX)** > **Sales** nodes and click **Accounts**.
5. With the **Rule Sets** tab selected, click **Summarize Layout** dynamic form.

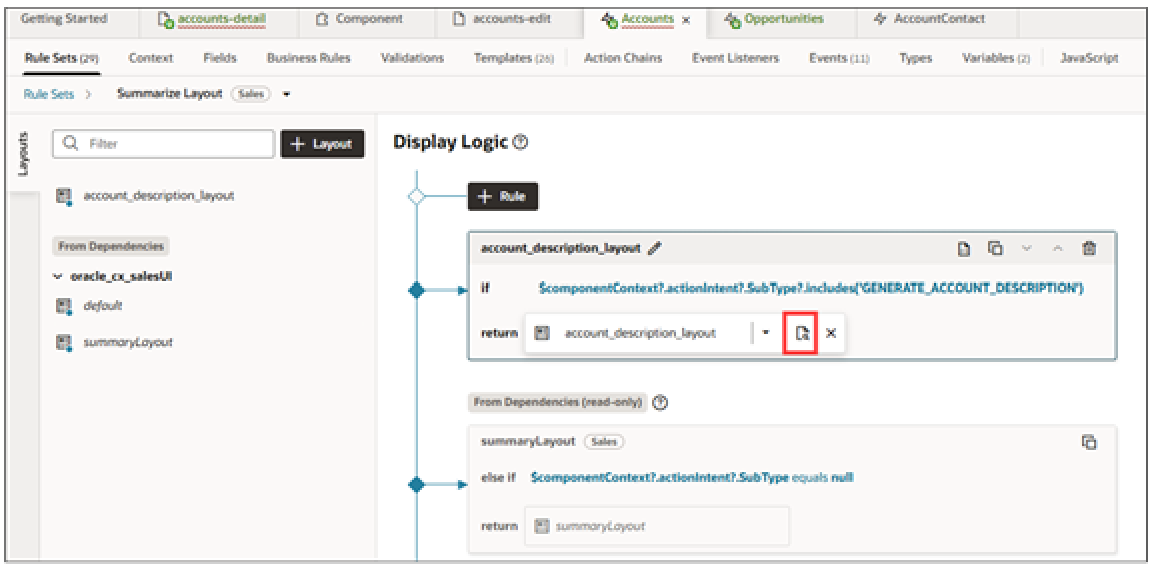


6. In the Display Logic section, duplicate the **IsDefault19** rule.
7. In the **Duplicate Rule** dialog, enter a name such as `account_description_layout`. Keep the checkbox **Also create a copy of the layout** selected.

8. Click **Duplicate**.



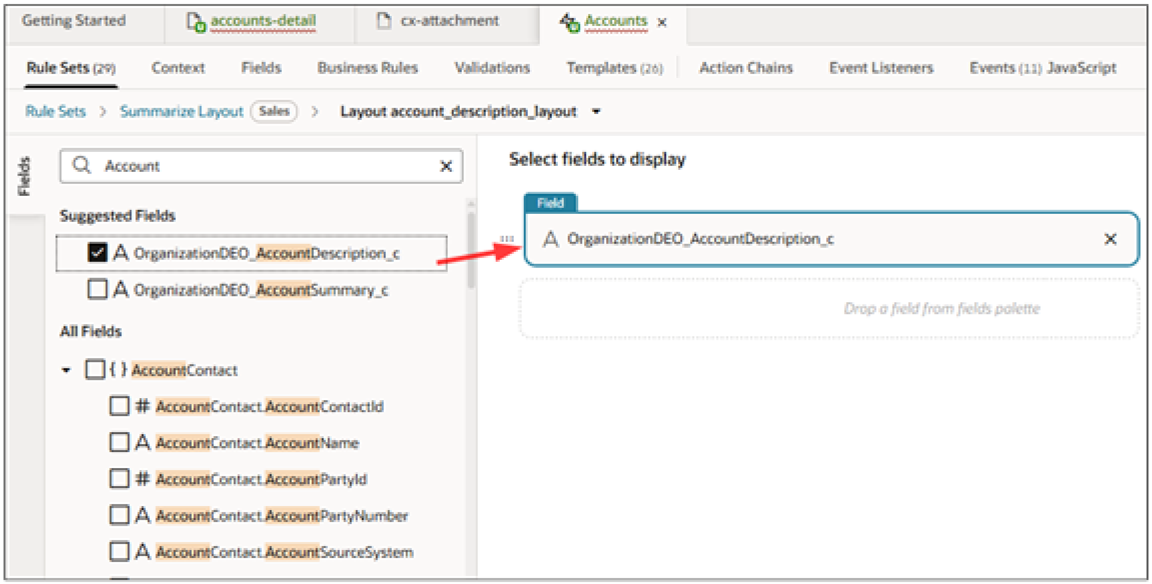
9. Open the layout you duplicated.



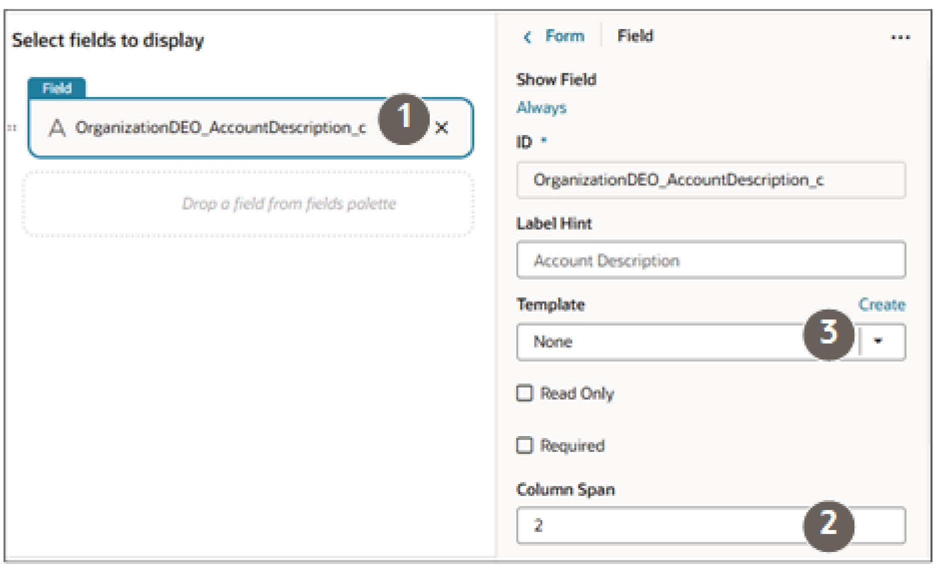
10. Click the **Select fields to display** box.
11. In the **Select fields to display** column, remove any fields by clicking on the delete icon (X).

12. On the Suggested Fieldxs column, search and select the custom long-text field that you created and drag the field to the **Select Fields to Display** section.

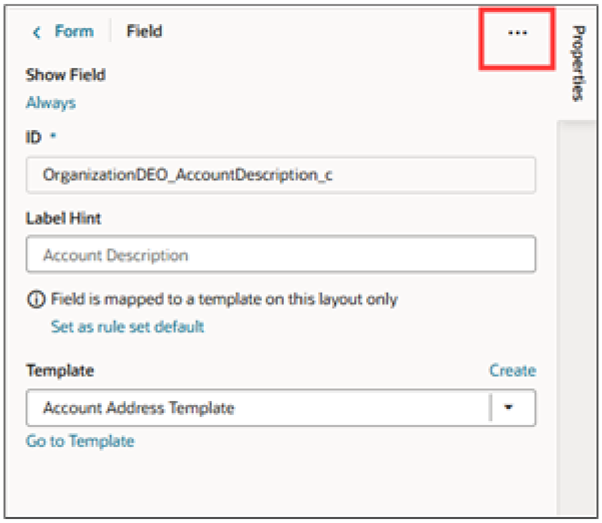
    The field name includes the additional characters `A_OrganizationDEO_` and is appended by `_c`. In this example: `A OrganizationDEO_AccountDescription_c`



13. Click the field.
14. In the **Show Field** column, **Column Span** field, enter **2**.
15. From the **Template** list, select any of the templates, such as the Account Address Template.

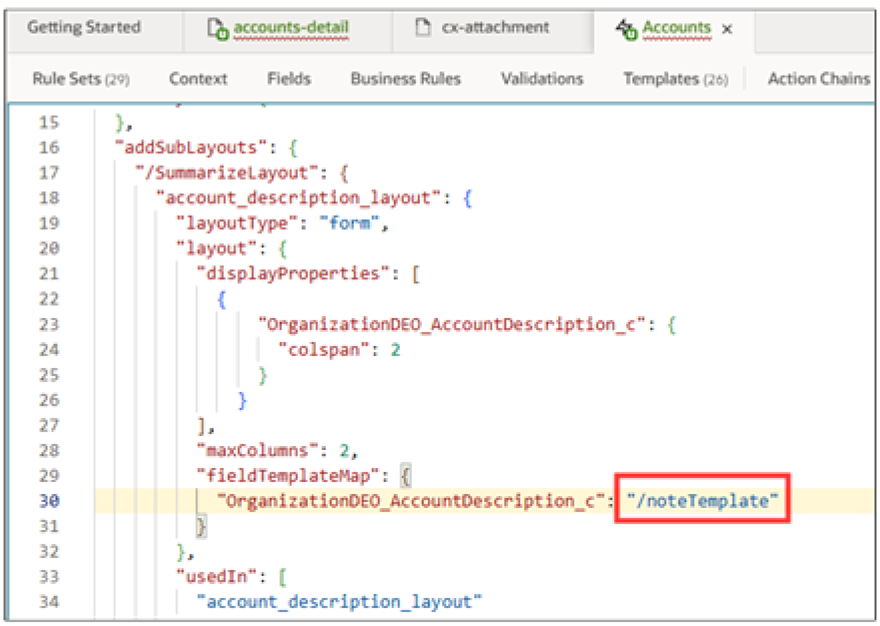


16. Switch to the code mode by clicking on the 3 dots icon.



17. On the **JSON** tab, search for the `/SummarizeLayout` section and go to the `account_description_layout` layout section.
18. Change the template for the field in the `fieldTemplateMap` section to `/noteTemplate`.

    The following screenshot highlights the change.



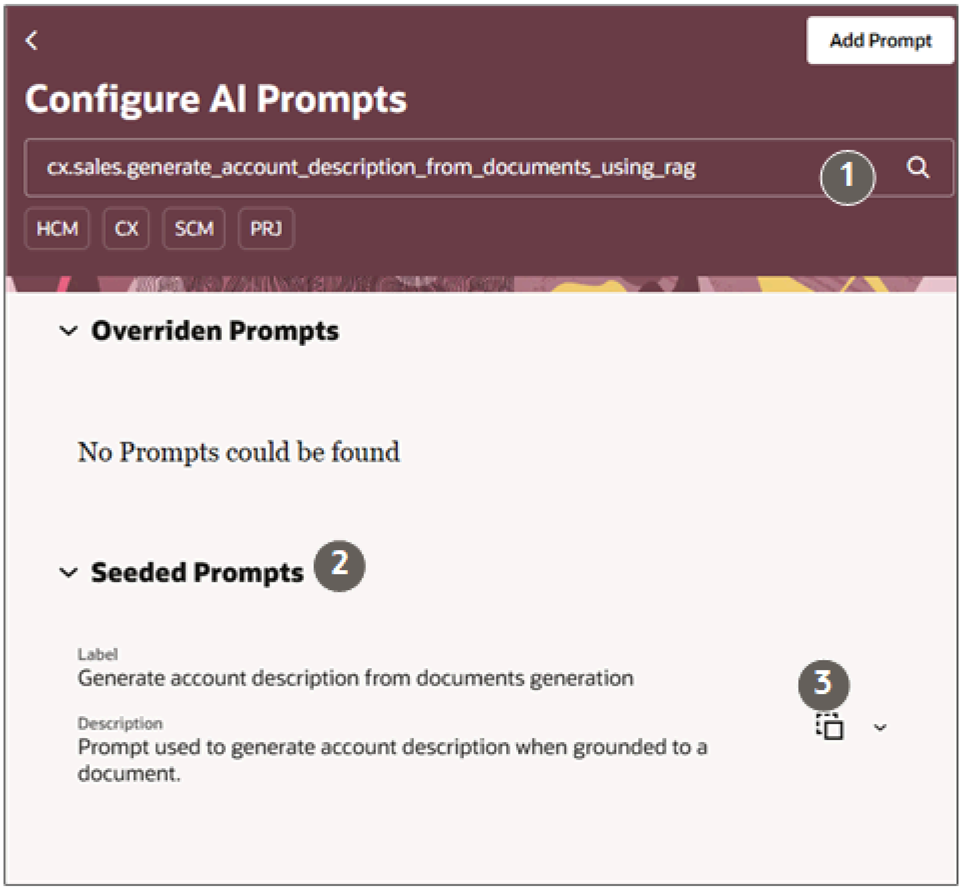
19. Test your work by clicking **Play** (Arrow) button.

Modify the GenAI Prompt

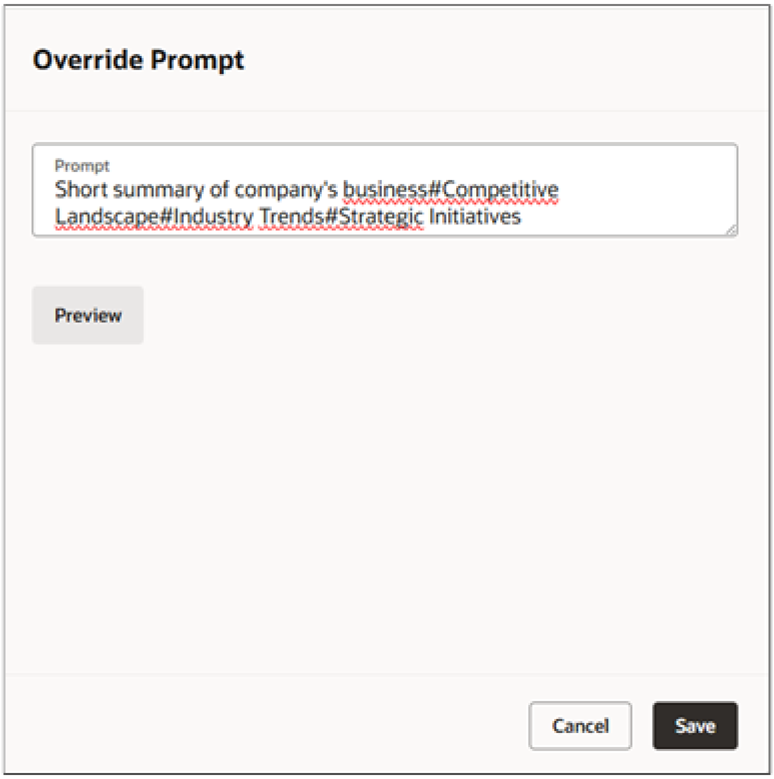
Here's how you can modify the LLM prompt to highlight different details in the account description.

1. Create a sandbox with the **HCM Experience Design Studio** tool.

2. In the sandbox, open the tool. (**Tools** > **HCM Experience Design Studio**).
3. Click **AI Configurator**.
4. Search for **cx.sales.generate_account_description_from_documents_using_rag**.
5. Open the **Seeded Prompts** section. (callout 2)
6. Click **Override** (the square icon highlighted by callout 3).



7. In the Override Prompt drawer, edit the prompt to request additional detail. Start each request with a **#** (number) sign.



   The generated description organizes the information using these headings. For example, entering **Short summary of company's business#Competitive Landscape#Industry Trends#Strategic Initiatives** will include information about these company aspects under their respective headings.
8. Click **Save**.

   Your changes take effect immediately. There's no need to publish the sandbox. While you can preview here it's best to test with a real account.

Generate Account Descriptions

To generate the description for an account, display the account details page and enter **Generate Account Description** in the Ask Oracle bar. Here are the detailed steps

1. Sign in to the sales application as a user with the Sales Administrator job role, or another role with the privilege ZCA_USE_GENAI_IN_SALES_PRIV.
2. Open the **Redwood Sales** > **Accounts** work area.
3. Search for and display the details page for the account where you want to create the description.
4. Enter **Generate Account Description** in the Ask Oracle bar and select the **Generate Account Description** action.
5. Create the description:

   a. Upload one or more PDFs that you want to use for your description, such as a company 10-K report.

b. Select the PDFs you want to use to generate the description. If you didn't upload any documents, the description is generated by the LLM from publicly-available information it's been trained on.
c. Click the **Generate** button. Each time you click the button the application generates a version of the description.
d. Add prompts to fine-tune the description language and regenerate. You can ask the LLM to add bullets, shorten the text, or change the tone, for example.
e. You can edit and format the text yourself.
f. You can generate multiple versions of the description and copy and paste between the versions you generated. The versions are available until you save.

6. Click **Save** to save the Recent version of the description and make it available to salespeople.