Oracle Fusion Cloud Sales Automation

How do I get started with Routines?

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1 How do I get started with Routines?

Overview of Routines

Routines are designed to perform a specific action based on a set of rules. As a sales administrator, you can create and update simple, lightweight routines to help salespeople, administrators, and data stewards to automate an action for pertinent sales information. Routines can scan records to evaluate if they meet conditions over a period of time.

Let's say you want to retire aging leads or close tasks open for more than 90 days. You create a routine to retrieve and filter records meeting specified rules, and, upon a trigger, perform actions within the context of those records. Routines are scheduled to run at certain predefined intervals, and the associated rule conditions can also be based on specific time intervals.

The key components of a routine are:

- Trigger

  A trigger is something that starts the routine run process. It's based on a schedule event, such as daily, weekly, monthly, or yearly, and sometimes, a routine run process can be triggered on an event.

  > **Note:** Oracle Sales in the Redwood User Experience users will have access to other triggers to specify when the routine runs. For example, in addition to the defined recurring schedules, they can choose to run the routine as soon as an attribute is changed or when a record is created or deleted.

- Rule

  A rule contains a set of conditions that a record must meet before an action can be performed.

- Action

  An action is a business task performed on records that meet the rule conditions.

Take this example of a schedule-driven routine:

```
Every day, update all leads older than 30 days to inactive
```

In this scenario, Every day is the **trigger**, older than 30 days is the **rule**, and update lead to inactive is the **action**.

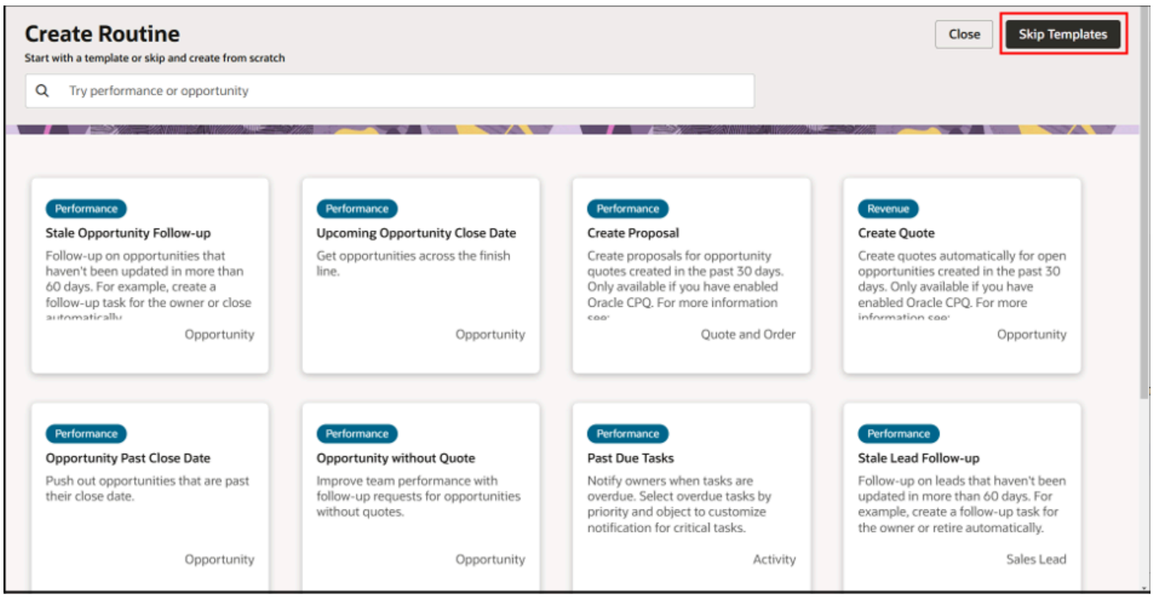
Here are some more use case examples of how routines can help salespeople perform routine tasks for the following sales objects.

Examples of Routines

Object	Use Case	Example
Account	Inactivate Aging Accounts	Update an account to inactive if it hasn't been updated in over 5 years. You can configure other time lines to suit your requirements.
Activities	Close Open Activities	Perform an action to close tasks that are past due by 90 days.

Object	Use Case	Example
Lead	Retire Aging Leads	Retire qualified leads that haven't been updated for a specific time period and have a low rank.
Opportunity	Close Opportunities	Set opportunity status to Closed when close date is older than a specific number of days.

You can choose to create a Routine from scratch or select from one of the predefined routine templates that match your requirements.



How do I access the Routines dashboard?

Sales administrators and users with the appropriate access privileges can view and create routines from the routines dashboard. Other sales users can get access to configure and manage routines based on granting the appropriate functional privilege to their roles.

Before you start

To use routines, you must have the Manage Routines privilege (ZCA_MANAGE_ROUTINES). This privilege is available to the following roles by default:

- Application Implementation Consultant
- Sales Administrator
- Customer Relationship Management Application Administrator

> **Note:** If you're working with custom objects, you'll also require the ORA_CRM_EXTN_ROLE role.

Here's how to access the routines dashboard:

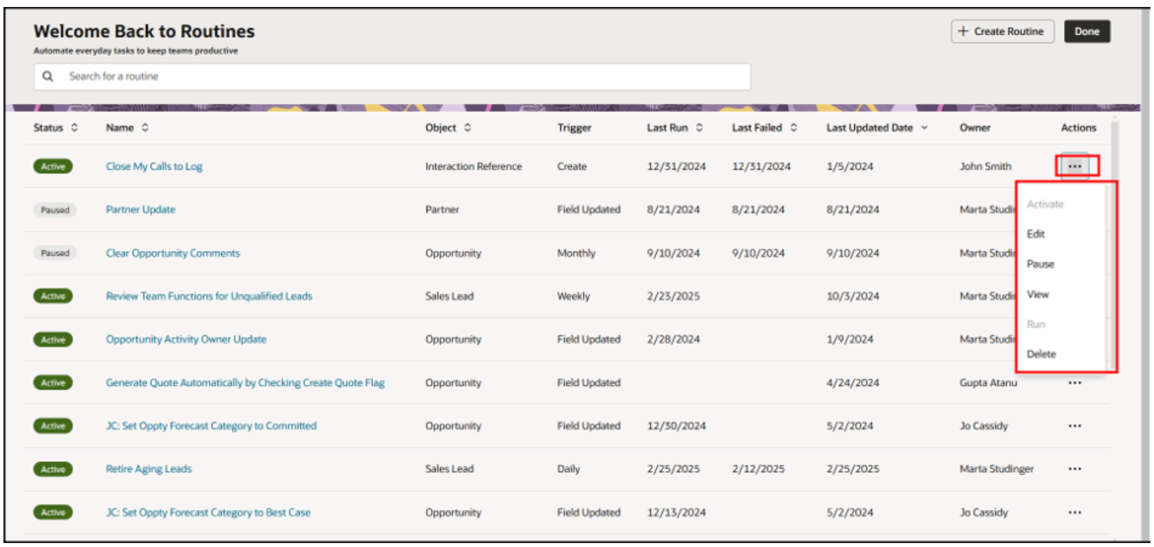
1. Open Sales Administration by selecting **Configuration** > **Sales Administration** in the Navigator menu.
2. Click **Routines** to open the Routines dashboard.

> **Note:** If you've access, then you can also access routines from Application Composer by selecting **Configuration** > **Application Composer** > **Routines**.

Overview of Routines Dashboard

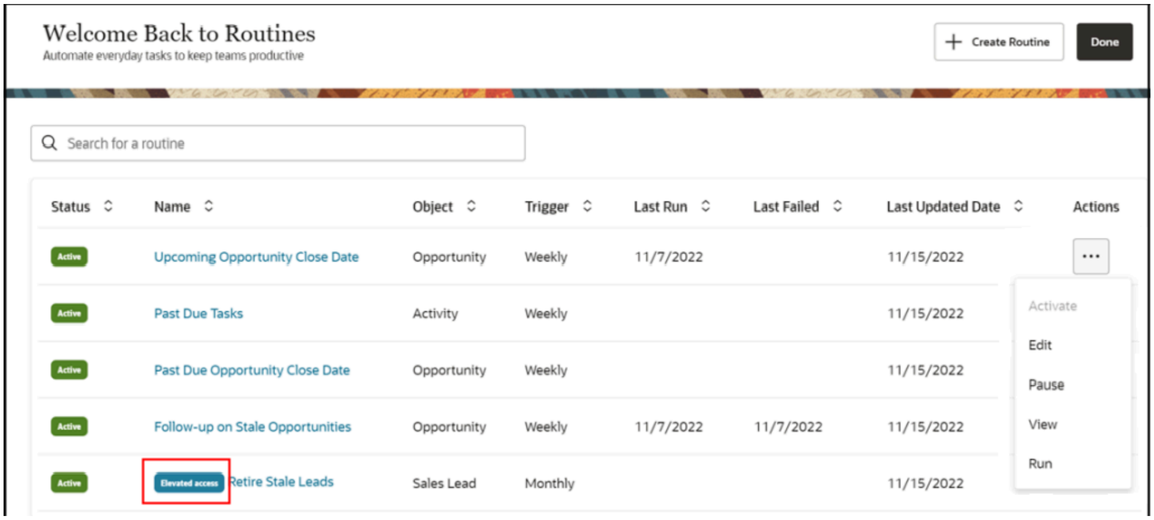
If you've the Manage Routines privilege, then you can run and view all routines created for your organization from the routines dashboard.

Here's an example of some routines created by administrators from the Routines dashboard:



From the Routines dashboard, you can run a routine on demand. This means that you run a routine immediately to view the results or to re-run a routine after correcting errors.

Routines that are scheduled to run across all data for an object are denoted by the **Elevated access** badge as shown in this sample screenshot.



The badge is displayed for those routines that have the **Schedule routine with elevated access** checkbox selected during the creation of the routine.

> **Note:** The checkbox is only available to users who are assigned the ZCA_SCHEDULE_ROUTINE_APPID privilege to their role. If you're working with custom objects, you'll also require the ORA_CRM_EXTN_ROLE role.

If you're using Sales in the Redwood UX, you can react in real time when a record is created, updated or deleted by triggering a routine to run immediately. Event triggers inform stakeholders of key changes so they can respond in a relevant time period. For example, event routines can create tasks, update fields and notify members of critical changes when the owner is changed on a lead, opportunity or task.

> **Note:** The option to Schedule Routine with Elevated Access is removed because event routines are run for all records meeting the routine trigger and rules.

Delete is also available as a quick action to delete routines that are no longer needed. When a routine is deleted, the routine definition and history are permanently deleted.

You can also activate and pause routines and view a summary of the routines. For example, you can:

- Create, view, edit, and pause routines that are currently in process
- View schedule details
- View last run results
- View list of records processed by the routine

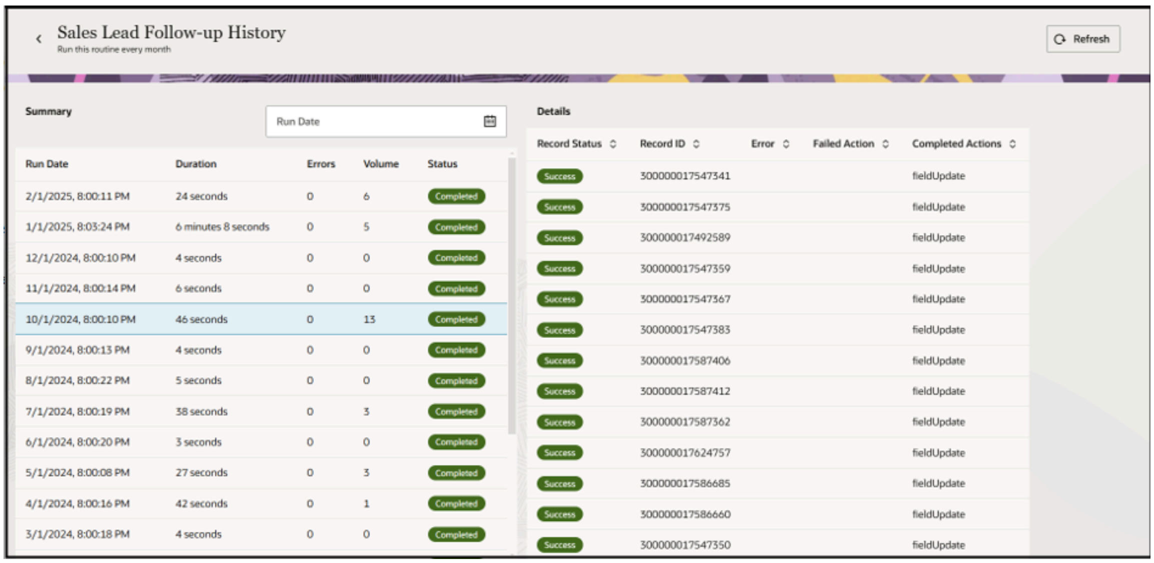
This table describes some routine processing information that you can view at a glance from the dashboard.

Status	Name	Object	Trigger	Last Run	Last Failed	Last Updated Date	Actions
Status of the routine such as Active or Paused.	Name of the routine.	Business object associated with the routine.	Indicates how often the routine runs according to	Date of the last run for the routine.	The most recent date when the routine had a run with errors.	Date the routine was last updated.	Menu action to activate, edit, pause, view or run a routine.

Status	Name	Object	Trigger	Last Run	Last Failed	Last Updated Date	Actions
			it's schedule, such as daily, weekly, monthly or yearly.				

Select the **View** menu item from the Actions (three dots icon highlighted in the screenshot) menu to view a summary of the routines that were run and to drill down to the records processed.

Select a row from the Summary section to view the details for the selected run. Here's a sample screenshot:



How do I automate repeated tasks using Routines?

Create routines to do repeated tasks and free up time for your sales organization to focus on selling.

Watch video

You can create a routine to alert your users when opportunities are stuck and require attention to move them along the sales cycle. Or you can update obsoleted or outdated information and provide timely and relevant reminders for salespeople to focus on key customers.

Actions and rules instruct the routine what activity to perform on an object. For example, rules tell the routine which sales leads to process for the actions. You can group rules together and select whether all or any of the criteria must be met. You can include all or any of the group rules and there's a limit of 15 rules per group. Specify rules which need to be met in order for the routine to perform a certain action. You create and deploy the routine from the dashboard. Routines run on a recurring schedule, defined as daily, weekly, monthly and yearly and are scheduled through the Enterprise Scheduling Service process.

Note: If you're using Sales in the Redwood UX, you'll have access to extra triggers to specify when the routine runs.

When you submit the routine, it's scheduled to run at the allocated time unless you choose to set pause for the specified run.

Create a Routine

Here's how to create a routine without selecting any of the predefined templates.

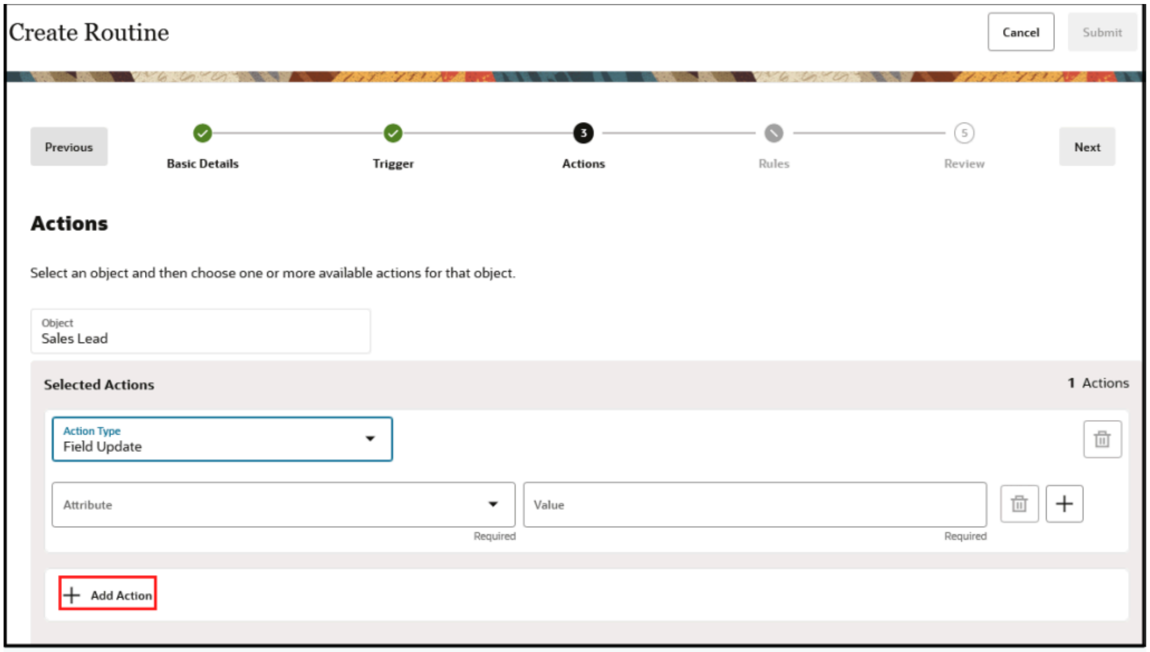
1. Navigate to **Configuration** > **Sales Administration** > **Routines** to access the Routines Dashboard.
2. Click **Create Routine** and then click **Skip Templates**.
3. From the **Basic Details** section, enter a name and brief description for the routine and select the object you want from the object drop-down list.

   You can also create routines for child objects as well such as lead and opportunity contacts, opportunity revenue, interaction references, and include their parent attributes in the rules.

   Note: If you change the object as you proceed through the guided process, then any actions and rules for that object will be cleared automatically. You'll need to enter actions and rules again for the object you want.
4. Click **Next**.
5. From the **Trigger** section, select the frequency for which you want this routine to run from the list of available triggers.

   You can select from Hourly, Daily, Weekly, Monthly, or Yearly. In addition to the predefined frequency triggers, Sales in the Redwood UX users will have the option to run the routine as soon as an attribute is changed or when a record is created, updated, or deleted. You can select up to 5 attributes if you choose to select the **Attribute changed** option.
6. Select the **Schedule routine with elevated access** checkbox to schedule the routine to run across all data for an object. Note that this checkbox is only available to users assigned the CA_SCHEDULE_ROUTINE_APPID privilege to their role.

7. Click **Next** to go to the **Actions** section as follows.



8. From the **Selected Actions** area, select the **Action Type** you want from the drop-down list.

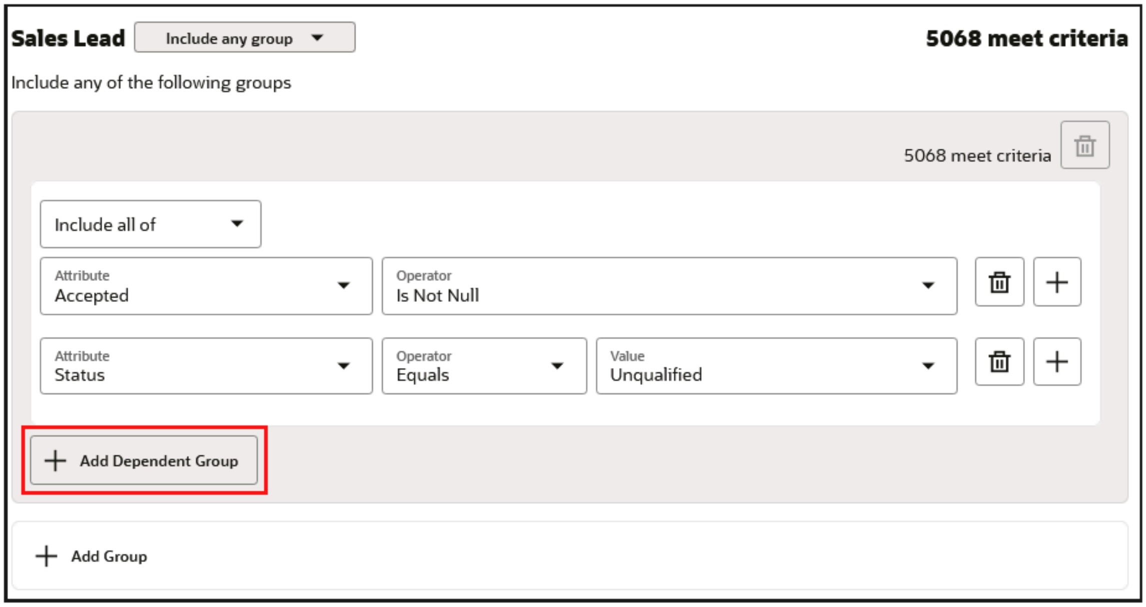
   Fields marked updatable in Application Composer are available in the attribute list for the **Field Update** action.
9. Add the attributes and associated values for the selected Action Type and click the plus (+) icon to add more attributes for the selected action type.
10. Click **Add Action** to add other action types. Click **Next** when finished to add rules for your action types.

11. From the **Rules** section, set up the rules and conditions that you want to meet to trigger the routine. Any recommendations based on your selected actions will be populated.

    Fields specified as searchable in Application Composer are available in Rules from the attribute list.

    > **Note:** You can group conditions to create more complex rules. Within a group you can choose to include any or all the conditions and choose to include any or all groups.

    For key objects such as Account, Contact, Opportunity, and Sales Lead, you can add dependency rules by clicking the Add Dependent Group button as highlighted in this sample screenshot. Any dependent rule groups you add are added to the parent rules.

    a. Select **Include all groups** if you want all rule conditions to be met in order for the routine to perform a certain action. Or, select **Include any group** if you want any of the rules to trigger the action.
    b. Click **Add Dependent Group** to add a dependency rule condition for the selected groups area.
    c. Click **Add Group** to add a rule condition from the selected groups area.
12. Add the attributes and associated values for the selected group options.
13. Click **Next** to preview or edit your routine.
14. Click **Submit** to create your routine.

Supported Objects and Actions

Sales administrators and users with the appropriate access privileges can view and create routines from the routines dashboard. Other sales users can get access to configure and manage routines based on granting the appropriate functional privilege to their roles.

The following table lists the supported sales parent objects and their predefined associated action types for sales routines:

Supported Sales Parent Objects for Routines and Associated Action Types

Parent Object	Action Type
Account	• Field Update • Create Task • Send Email
Activity	• Field Update • Send Email
Asset	• Field Update
Business Plan	• Field Update • Send Email
Campaign	• Field Update
Case	• Field Update • Send Email
Contact	• Field Update • Create Task • Send Email
Conversation	• Field Update
Custom Objects	• Field Update • Send Email - available only if email annotations is enabled
Household	• Field Update • Send Email
Interaction	• Field Update • Close Activity • Send Email
Opportunity	• Create Quote **Note:** You must have Quotes configured to create a quote from the opportunity. • Create Task • Field Update • Send Email
Partner	• Field Update

Parent Object	Action Type
Partner Enrollments	• Field Update • Send Email
Product	• Field Update
Product Structure	• Field Update
Quotes and Orders	• Field Update • Create Proposal
Resource	• Field Update • Send Email
Sales Competitor	• Field Update
Sales Lead	• Field Update • Convert • Create Task • Send Email
Service Request	• Field Update • Send Email
Subscription	• Field Update • Send Email

Note: Not all the supported objects are sales objects. For example, Partner and Partner Enrollments are only pertinent for Partner Relationship Management, and Service Request are specific to Fusion Service. You can also access and manage any custom objects or custom child objects that your administrator created in Application Composer.

The following table lists the supported child sales objects and their predefined associated action types for sales routines:

Supported Sales Child Objects for Routines and Associated Action Types

Child Object	Action Type
Component	• Field Update
Conversation Message	• Field Update • Close Activity
Conversation Reference	• Field Update

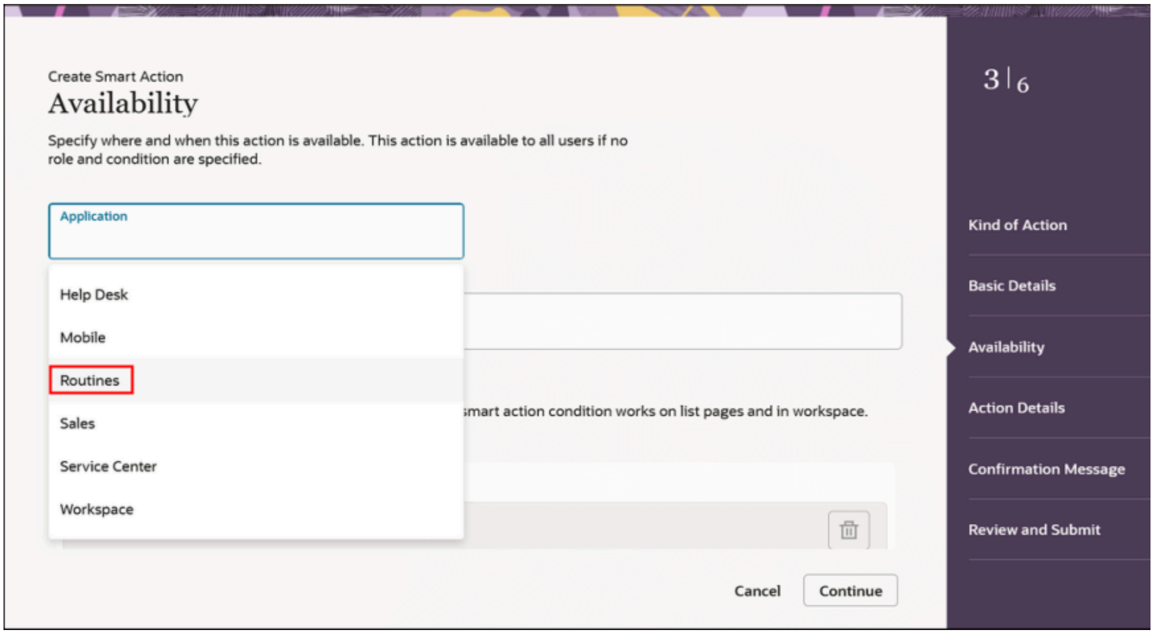
Child Object	Action Type
Custom Child Objects	• Field Update • Send Email - available only if email annotations is enabled
Interaction Reference	• Field Update • Close Activity
Opportunity Contact	• Field Update • Send Email
Opportunity Revenue	• Field Update • Send Email
Sales Lead Contact	• Field Update • Send Email

What kind of processes can I create using custom smart actions in Routines?

As a sales administrator, you might want to create a routine to use object functions on both standard and custom objects. You can now use custom smart actions to perform custom processes in routines, such as API or object function calls.

For example, if a lead owner doesn't have a sales representative role, then you can create a custom smart action to remove the owner so the lead gets reassigned. Other examples of where a custom smart action could be used in routines might be to update a custom field with a formula and so on.

You can create custom smart actions for routines as needed in Application Composer. Any custom smart actions that you create will show in your routines only if you selected **Routines** in the **Application** as shown is this sample Create Smart Action page.



See *Overview of Smart Actions* for information about how to use and create smart actions.

Object functions are Groovy scripts that are defined for an object in Application Composer and are created in a sandbox. See the Object Functions section of the Configuring Applications Using Application Composer guide for more information about object functions.

If you want attributes to be available for use in the routine **Field Update** action type, then they must be set to **updatable** in Application Composer. In addition, attributes available in the Rules section of the custom routine must also be set as **searchable** in Application Composer.

About Scheduling Routines

Understanding scheduling can help you decide the best recurrence period when creating routines. Routines run on a recurring schedule, defined as hourly, daily, weekly, monthly, and yearly.

To schedule and run routines, you must have the appropriate privileges and job roles. For example:

- You must first already have access to Routines via the privilege, ZCA_MANAGE_ROUTINES.
- The ZCA_SCHEDULE_ROUTINE_APPID privilege must be assigned to the desired role. If you're working with custom objects, you'll also require the ORA_CRM_EXTN_ROLE role.

During the trigger step of the Create Routine work flow, you can select the **Schedule routine with elevated access** checkbox to schedule the routine to run across all data for an object. Once a routine is created with elevated access, the access can't be changed.

Routines are scheduled through the Enterprise Scheduling Service process and are included as part of your daily application processing.

For best performance, the application:

- Divides each day into 24 available time slots

- Assigns a maximum of 5 routines to start for each time slot
- Sets a maximum limit of 10,000 rows a routine can process per time slot.

Once a routine is assigned a day and time slot, it continues to run on that specific day and time. The application schedules to run routines between days 1 to 28 of the month.

Here's a table that lists the maximum number of routines in a day for each schedule period and the maximum number of routines that can be run for a schedule period.

Routine Scheduling Details

Schedule Time Periods	Total Daily Time Slots	Total Time Slots per Period
Hourly	24	Hourly routines are limited to 250 records per run.
Daily	80	Schedule up to 80 routines daily.
Weekly	20	Schedule up to 140 routines weekly.
Monthly	15	Schedule up to 420 routines monthly.
Yearly	5	Schedule up to 1,680 routines yearly.

2 Rules

Dependency Rules for Key Objects

You can add dependency rules when creating routines for key objects such as accounts, contacts, leads and opportunities.

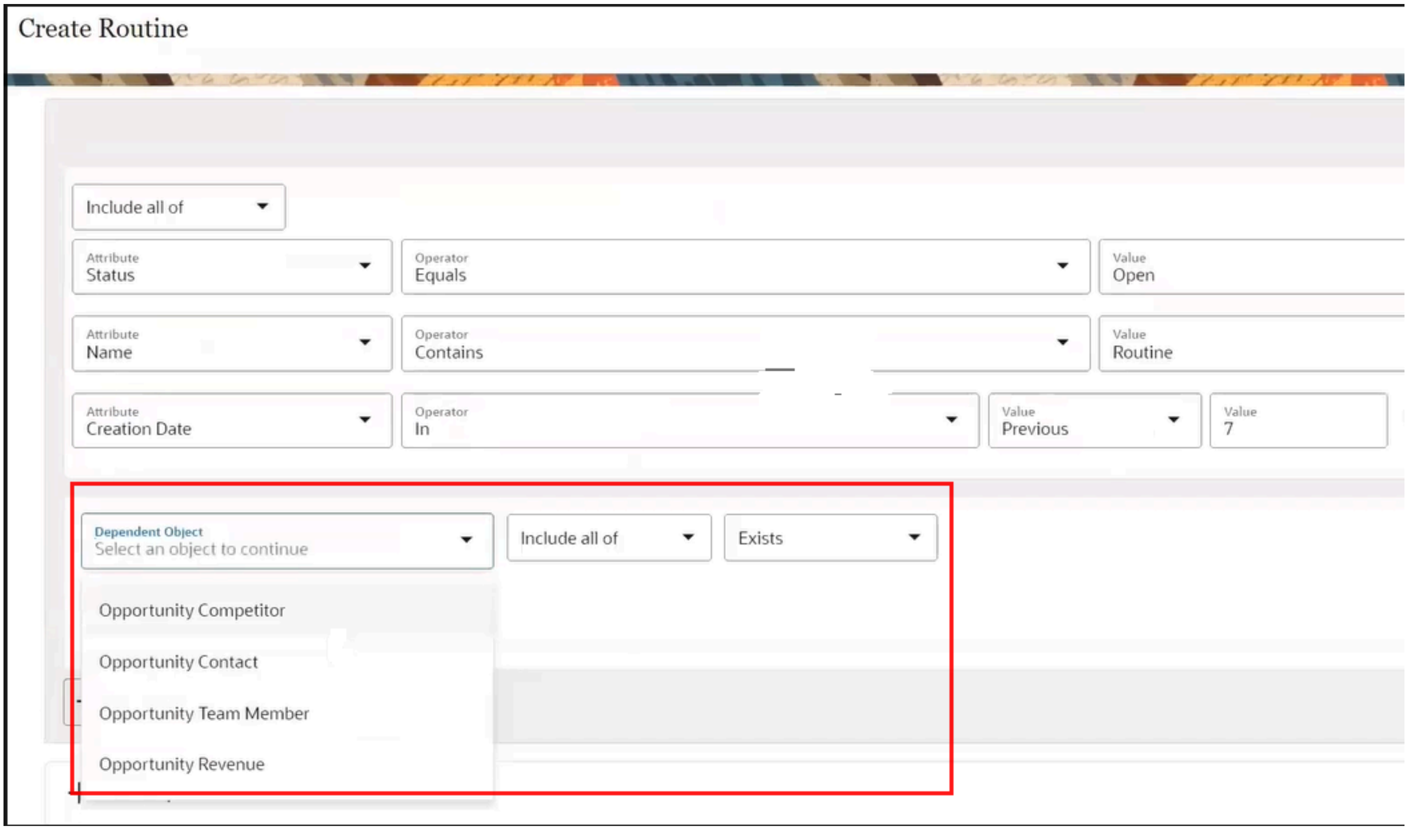
Routines are designed to perform a specific action based on a set of rules. As a sales administrator, you can create and update simple, lightweight routines to help salespeople, administrators, and data stewards to automate an action for pertinent sales information. Routines can scan records to evaluate if they meet conditions over a period of time. For example, you might want to create a routine to scan all opportunities that haven't be updated in past few weeks.

This table lists the dependency rules associated with key objects when creating a routine.

Object	Dependency Rule
Account	• Address • Sales Team Member
Contact	• Address • Sales Team Member
Opportunity	• Opportunity Competitor • Opportunity Contact • Opportunity Team Member • Opportunity Revenue
Sales Lead	• Sales Lead Contacts • Sales Lead Products • Sales Lead Resources • Sales Lead Territories • Opportunities

You set up the rules and conditions that you want to meet in order to trigger the routine. From the Rules section of the Create Routine guided process, you can group conditions to create more complex rules and choose to include all or any of the groups.

For key objects such as Account, Contact, Opportunity, and Sales Lead, you can add dependency rules by clicking the Add Dependent Group button. Here's a sample of where you add rules for the Opportunity dependent objects.



Enter Run Date Values for Routine Rules

When setting rules for date-based related attribute such as Last Update Date, Creation Date, Close Date and so on, selecting the equals (=) operator lets you choose from the Run Date and Select Date options.

Routines also let you specify date variables to calculate the date based on the routine run date, plus or minus a specific number of days in integer format. For example, for the Update Field and Create Task actions you can create a task or update a field with a due date of the routine run date plus 7 days. This means that if all routines rules are met, the routine will continue to process and update records 7 days past the specified due date.

Here's how to enter run date values for date-related attributes when creating rules.

1. From the Routines dashboard, click **Create Routine**.
2. Enter the name and a brief description of what the routine is used for and select the object you want for your routine.
3. From the Actions section, click **Add Action** and select the **Action Type** you want.
4. From the Rules section, set up the rules and conditions that you want to meet to trigger the routine.

   Note: To set a value for, let's say, the opportunity Close Date attribute, then if you select the "since" operators, you get more options to select either a specific quarter, such as This Quarter, Next Quarter or Last Quarter. You can also select a flexible run date, or you can set a specific calendar date.Also, when you select **Run Date**, you can select a plus or minus operator to either add or subtract a number of days value to the set run date. For example, you can select the plus operator to enter a numeral in the Value field.

5. Schedule, review and click **Submit** when done.

3 Frequently Asked Questions (FAQs) for Routines

Why don't I see lists of values for DCL and CLOB field types when creating rules for my Routine?

List of values aren't displayed in the Value field for Dynamic Choice List (DCL) field types in the Rules section of the **Create Routine** guided process. They're not supported and Oracle recommends that you not use DCL, Character Large OBject (CLOB), or any transient fields when creating Routine rules.

However, you can use DCL fields from Routines by manually entering the values. The value you manually enter must exactly match the LOV entry. At runtime, if a record meets the rule conditions, it will be selected.

Can I use routines to condense the number of emails I send to recipients?

Yes, you can use the Summary Email option to reduce the number of emails sent to a recipient during a routine processing run by condensing them into a summary email. This option lets you enter a summary message, select up to 5 fields to be displayed in a table at the end of the email which will be automatically sent to the recipients listed for the summary email.

Routines will list a maximum of 50 rows per email and automatically inserts a link of the record identifier at the beginning of each table row.

Why can't I add another rule to my routine group?

A maximum of 15 rules is allowed per group for a routine. You can add another group to specify additional rules.

How do I pause routines?

You can view routines from the dashboard at any stage. Once you create a routine, the application schedules it to run at the next available slot. If you want to stop a routine from running, select the **Pause** menu item from the Actions (three dots icon) menu. You can click **Activate** to restart the routine process again for your routine.

Can I create appointments using routines?

No. There isn't an action in Routines to automatically create appointments because appointment details, such as when to schedule the appointment, the duration of the meeting, who should attend, and so on is unknown.

Why can't I find the attribute I want to update for my routine?

Only attributes defined as `updatable` in Application Composer are available for use in the Field Update action. In addition, attributes available in the Rules section must also be set as `searchable` in Application Composer.

When must I specify the currency code in my routine?

If you're updating currency amounts, you must specify the currency code in the rules section and field update action for your routine.

Can I stop actions being performed on the same records?

You can stop actions being performed on the same record each time you run a routine.

Rules are applied to select records for processing when a routines runs. If you don't want the actions performed on the same records each time, then include rules that exclude previously run records.

Let's say you have a routine that updates the record status to Won for opportunities with a Close Date in the last quarter. To ensure that those records already updated to the won status aren't processed again, you can insert a rule that checks only for all opportunity records with a status of not equal to Won.