# Oracle Fusion Cloud Sales Automation

## How do I get started with Sales Pipeline Management?

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## 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.

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# 1 Introduction

## Overview of Pipeline Management

The primary objective for sales leaders is to maximize the potential of their sales organization. To achieve better sales execution, Oracle Pipeline Management gives sales managers real-time pipeline visibility so they can maintain a healthy pipeline, prioritize deals, and help their team focus on key and at-risk opportunities.

Pipeline Management provides sales managers with these benefits:

- Real-Time Pipeline Visibility

  Inspect and maintain a healthy pipeline with a consolidated view of pipeline metrics, opportunities, weekly changes, and AI insights. Get a snapshot of the pipeline in real-time, filter by key information, and switch between default and custom views.
- Improved Sales Execution

  Speed up decision-making with instant access to key pipeline information, and streamline decision-making and uses real-time insights to guide and coach reps on next best steps.
- Proactive Risk Mitigation

  Identify and address potential risks before they escalate. Using AI and pipeline trends, teams can focus on key and at-risk opportunities and gain real-time visibility into opportunity health, orchestration, and activities.

### Default Views

Pipeline Management provides 3 default views:

- **All Opportunities**

  Shows opportunities I can see with options to filter by opportunity owner, name, assigned territory owners/ members, and forecast territory owner/members.
- **My Team Opportunities**

  Shows opportunities owned by resources in the hierarchy below the sales manager.
- **My Territory Opportunities**

  Shows opportunities with one or more product lines, with a forecast territory in the hierarchy below the sales manager territory.

### Pipeline View Security and Filters

Here's how the pipeline default views apply security and filters to display opportunity information:

1. All 3 views provide users access using Opportunity Access Group security. The My Territory Opportunities view also leverages Territory Access Groups to provide access the territories and the territory hierarchy.
2. Each view applies the required filters for that view.

3. Users can add optional filters.

The following table lists the required and optional filters for each view:

| View | Required Filters | Optional Filters |
| --- | --- | --- |
| All Opportunities | Period (single): Current Quarter | 1. Opportunity Status = Open (multiple)<br>2. Team (matches against the opportunity owner)<br>3. Territory (matches against the revenue forecast territory) |
| My Team Opportunities | 1. Period (single): Current Quarter<br>2. Team (single): Opportunity Owner = selected resource or descendant in the resource hierarchy | Opportunity Status = Open (multiple) |
| My Territory Opportunities | 1. Period (single): Current Quarter<br>2. Territory (single): forecast territory = selected territory or territory descendants in the territory hierarchy | Opportunity Status = Open (multiple) |

## Other Sales Features Leveraged by Pipeline Management

- Predicted Win Probability

  This Sales Intelligence feature is displayed by default for each opportunity and used to drive the health badge (At risk, Needs attention, On track) for each key performance indicator (KPI).
- Activity Effectiveness (optional).

  If the Sales Intelligence capability is enabled, the calculated activity effectiveness information is shown in the Key Information drawer.
- Guidance

  The next step guidance created in the Guidance feature (formerly called Orchestration).
- Activity Feed

  The recent activities captured in the opportunity.
- Deal Advisor

  To make Deal Advisor AI agent available in the Actions list for each opportunity, you must define a custom smart action with the context parent object option equal to Sales pipeline. Oracle also recommends enabling the option **Also display action when no context is specified**, to have this action available in the opportunity list and guidance pages.

## Known Limitations

Here's a list of known limitations for pipeline management for update 26B:

1. Sales managers can't see their own opportunities if they're the owner of the opportunity, or the owner of the forecast territory on the revenue sales credit.
2. Selecting the lowest level (sales rep) resource or territory in the team/territory filter doesn't display any opportunities (same limitation as above).

3. Both open and closed opportunities are shown by default.
4. In the My Territory Opportunities view, both revenue and overlay sales credits are shown by default.
5. In the My Territory Opportunities view, the opportunity count values in each key performance indicator (KPI) and the group by summaries show as zero (0). This also occurs in the All Opportunities view when grouping by Territory or Product Group – a design for this is in progress.
6. A sales administrator (or user with the equivalent sales administrator privilege) is unable to see the pipeline on behalf of sales manager/execs in the My Team Opportunities and All Opportunities views – a design for this is in progress.
7. Trending isn't enabled by default. Please contact Oracle Support if you wish to enable this feature in Pipeline Management.
8. Your environment must be enabled to use read-optimized data store (RODS) technology for you to use Pipeline Management. Please contact Oracle Support to enable the read-optimized data store.

# 2 Setup Tasks

## Pipeline Management High-Level Setup Steps

Here are the high-level setup steps for Pipeline Management, along with where to get more information about each step:

| Step | Where to Find More Information |
|---|---|
| **Step 1**<br>Your environment must be enabled for the read-optimized data store (RODS) to use Pipeline Management. Contact Oracle Support for this step. | Article on Oracle Cloud Customer Connect for more information: *CX Sales Center of Excellence Best Practice Resource Centers*. |
| **Step 2**<br>Ensure that your resource hierarchy is set up.<br><br>The resource hierarchy is used for rolling up opportunities based on resources in the hierarchy below the sales manager and is a required for the My Team Opportunities view. | *Pipeline Management Resource Hierarchy Dependency* |
| **Step 3**<br>Ensure that your territory hierarchy is set up.<br><br>The territory hierarchy is used for rolling up the opportunity revenue line assigned territory owners/members and forecast territory owner/members based on the territory hierarchy below the sales manager.<br><br>This step is needed for My Territory Opportunities view and might also be leveraged in All Opportunities view if you're using the Territory filter (based on a forecast territory assigned to each revenue lines). | *Pipeline Management Territories and Hierarchy Dependency* |
| **Step 4**<br>Ensure that you're using the access groups security model.<br><br>You use access groups to provide sales resources with additional access to sales data in business objects like opportunities and territories. | *Pipeline Management Access Group Dependency* |

| Step | Where to Find More Information |
| --- | --- |
| **Step 5**<br>Ensure Adaptive Search is enabled.<br><br>The Territory, Product Group, and Team filters in the search bar use Adaptive Search. Thus, ensure it's set up. | *Pipeline Management Adaptive Search Dependency* |
| **Step 6**<br>Create a Pipeline Management menu item so that sales managers and executives can access the feature using the Navigator and Springboard. This is a one-time setup step. | *Set Up the Pipeline Management Menu* |

# Pipeline Management Personas

Pipeline Management is designed for Sales Managers and Executives (for example, Sales VP) who will use pipeline management. Users with the Sales Administrator persona will also use pipeline management to support sales managers and executives.

- **Administration personas:**

  Sales Administrators
- **Pipeline Management personas:**

  Sales Manager

  Sales Executives/Sales VP

# Pipeline Management Resource Hierarchy Dependency

The sales resource hierarchy ensures that opportunity data rolls up to the sales manager using opportunities owned by the resources in the hierarchy below the sales manager. To use Pipeline Management, ensure that your resource hierarchy is set up.

The resource hierarchy is used in the following views:

- The My Team Opportunities and All Opportunities views
- Team filter

For more information about creating sales resources and the resource hierarchy, see:

- *Concepts for Creating Sales Resources*
- *Overview of Managing Resources*
- *Overview of Importing Sales Resources*
- *How do I manage resource organization hierarchy changes?*

Also see: *Pipeline Management Personas*

# Pipeline Management Territories and Hierarchy Dependency

The territory hierarchy is used for rolling up the opportunity revenue lines owned based on the territory hierarchy below the sales manager.

You need to define territories and the territory hierarchy and schedule territory assignment for opportunities regularly.

See *Overview of Sales Territory and Assignment Setup* for more information.

# Pipeline Management Calendar and Product Dimensions Dependency

Pipeline Managements uses the following common dimensions for filtering purposes:

- Time / Calendar dimension - ensures the **Period** filter shows all available past and future periods for which there are opportunities
- Product dimension - ensures that the **Product Group** filter shows the latest hierarchy

Run the following Analytics Data processes for ongoing maintenance of Pipeline Management:

- **Refresh Denormalized Time Dimension Table for BI**

  Run this process following updates to the CRM Calendar profile (ZCA_COMMON_CALENDAR) such as defining periods for future years. This ensures that the
- **Refresh Denormalized Product Dimension Table for BI**

  Run this process following updates to the Sales Catalog such as product group hierarchy changes.

For more information, see *Scheduled Processes for Analytics Data*.

# Pipeline Management Access Group Dependency

Access groups are a prerequisite for Pipeline Management. You use access groups to provide sales resources with additional access to sales object data. Access groups are a way of granting data permissions to users, and they use a different access path to that provided by the predefined data security policies.

Access groups provide the territory and opportunity data security access for sales managers using Pipeline Management. Territory access groups control the territories and hierarchy shown in the Territory filter. Opportunity access groups control the opportunities shown in the pipeline management table and whether the user has view, edit or delete access to individual opportunities.

The Perform Object Sharing Rule Assignment scheduled process is automatically scheduled to run (hourly) and picks up any changes since the last run. See *How do I run the Perform Object Sharing Rule Assignment Scheduled Process?* for more information.

For setup of access groups, see *Overview of Access Groups*.

## Best Practices for Access Group Setup with Pipeline Management

Note these best practices for access group setup with Pipeline Management:

- Identify the system access group defined for each custom job role
- Associate groups with appropriate Sales Territory and Opportunity rules
- Publish rules
- Submit the Perform Object Sharing Rule Assignment scheduled process with these options:
  - Objects: Opportunity, Sales Territory
  - Record Selection: All Records
- If you use custom job roles for your sales organization, you must manually associate the appropriate resource, sales territory and opportunity rules to your custom job role access groups to secure access for your salespeople, operations, and administrators.

# Pipeline Management Adaptive Search Dependency

The Territory, Product Group, and Team filters in the search bar use Adaptive Search. Thus, ensure it's set up.

## Ensure Adaptive Search is Enabled and You've Done Full Publish

The Territory, Product Group, and Team filters in Pipeline Management are based on Adaptive Search queries.

> **Note:** If you already have Adaptive Search enabled and have performed a full publish in the environment, you don't need to perform this step.

1. Sign as a sales administrator and go to Setup and Maintenance.
2. Search for the Configure Adaptive Search task and select it.
3. Go to **Setup** > **Actions** > **Full Publish**
4. Monitor the indexing process on the Monitor tab, Publish subtab.

See *Run the Full Publish Process* for more information.

## Enable the Related Product Groups Attribute

1. Sign as a sales administrator and go to Setup and Maintenance.
2. Search for the Configure Adaptive Search task and select it.
3. Go to **Setup** > **Advanced**.

4. In the Object list panel, expand **Product Group** and then expand **Product Group Parent Relations**.
5. Select **Related Product Groups** which is needed for the Product Group filter
6. In fields list, find `ListOfSelfAndAncestorIdsInBaseHierarchy`.
7. Select the **Enable** checkbox and save, then select **Actions** > **Partial Publish**.

See *Make Additional Fields Searchable* for more information.

## Enable the Parent Territory in the UI

1. Sign as a sales administrator and go to Setup and Maintenance.
2. Search for the Configure Adaptive Search task and select it.
3. Go to **Configure UI**.
4. Select the **Territory** object.
5. In the fields list, select the **Display in UI** checkbox for **Parent Territory**. This step is needed to display the territory hierarchy in the Territory filter.

See *Make Additional Fields Searchable* for more information.

# Pipeline Management Security Setup

There are a few required steps for the Pipeline Management security setup:

- *Set the Enable Security Console External Application Integration Profile Option*
- *Enable Permissions Groups for Custom Job Roles*
- *Add the Manage Pipeline Privilege to Users*
- *Add the Opportunity Pipeline Role to Users*

## Set the Enable Security Console External Application Integration Profile Option

You must enable this profile option to be able to see the Enable Permission Groups option (see next section) in the Edit Role page in the Security Console.

1. As a sales administrator or setup user, go to Setup and Maintenance.
2. Search for and select the task, Manage Administrator Profile Values.
3. Set the Security Console External Application Integration profile option (ORA_ASE_SAS_INTEGRATION_ENABLED) to Yes.

## Enable Permissions Groups for Custom Job Roles

Enable permissions groups for your custom Sales job roles:

1. As a setup user, navigate to **Tools** > **Security Console** > **Roles**.
2. Search for the role that you want to enable the Permission Groups for. Generally, these are the ones:
    - ORA_FND_AUTHENTICATED_USER_ABSTRACT
    - ORA_ZBS_SALES_ADMINISTRATOR_JOB
    - ORA_ZBS_SALES_VP_JOB

   - ORA_ZBS_SALES_MANAGER_JOB
   - ORA_ZBS_SALES_REPRESENTATIVE_JOB
3. For your custom job roles that match these, go to **Edit Role** > **BasicInformation**.
4. Select the **Enable Permission Groups** button.
5. Save your work.

See *Enable Permission Groups* and *Role Copying or Editing* for more information.

## Add the Manage Pipeline Privilege to Users

Create Opportunity Pipeline manager role and add the Manage Pipeline privilege to all Pipeline Management users so that they can see the View Key Information smart action for opportunities.

> **Tip:** To save time, in the Security Console, first check whether the Opportunity Pipeline Manager job role exists in the environment.

1. As a setup user, navigate to **Tools** > **Security Console** > **Roles**.
2. If the Opportunity Pipeline Manager job doesn't already exist, select **Create Role** and create the role with these values:
   - Role Name: Opportunity Pipeline Manager
   - Role Code: MOO_MANAGE_PIPELINE_JOB
   - Role Category: CRM - Job Roles
3. Select **Next**.
4. Select **Add Function Security Policy**, then search for and add the Manage Pipeline privilege (MOO_MANAGE_PIPELINE_PRIV) to the role.
5. Select **Next** until you can save and close.
6. Run the Import User and Role Application Security Data scheduled process before adding the role to users.

## Add the Opportunity Pipeline Role to Users

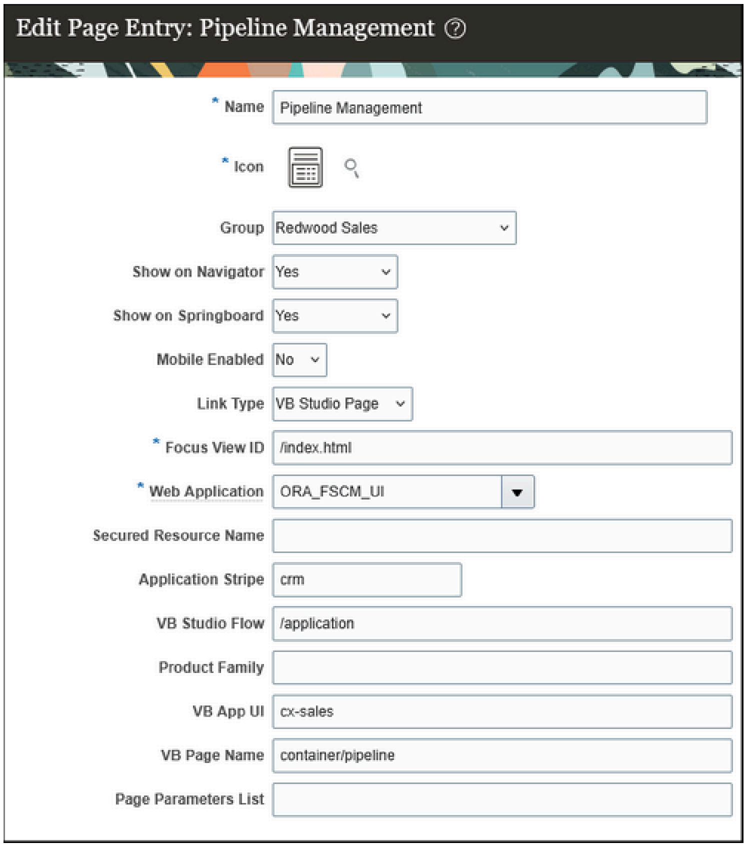
Add the role to your users.

1. As a setup user, navigate to **Tools** > **Security Console** > **Users**.
2. Save your work.
3. Repeat for additional users.

# Set Up the Pipeline Management Menu

Create a Pipeline Management menu item so that users can access the feature using the Navigator and Springboard.

1. As a sales administrator or setup user, navigate to **Configuration** > **Sandboxes**.
2. Select **Create Sandbox** and enter a name for the sandbox.
3. Select the **Structure** tool checkbox.
4. Select **Create and Enter**.
5. Save your work.
6. While in the sandbox, navigate to **Configuration** > **Structure**.
7. From the top-level menu, select **Create** > **Create Page Entry** and a screen similar to the following is displayed.




8. Enter a name for the page entry and select an icon.
9. Select **Redwood Sales** as the group.
10. Select **Yes** for Show in Navigator and Show in Springboard.
11. Select or enter values as outlined in this table to complete the setup:

| Field | Sample Value |
| --- | --- |
| **Mobile Enabled** | No |
| **Link Type** | VB Studio Page |
| **Focus View ID** | /index.html |
| **Web Application** | ORA_FSCM_UI |
| **Secured Resource Name** | Leave blank |
| **Application Stripe** | crm |
| **VB Studio Flow** | /application |
| **Product Family** | Leave blank |
| **VB App UI** | cx-sales |
| **VB Page Name** | container/pipeline |

| Field | Sample Value |
| --- | --- |
| **Page Parameters List** | Leave blank |

12. Save and test your work.
13. Publish the sandbox.