Oracle Fusion Cloud Sales Automation

What's my roadmap for implementing Oracle Sales in the Redwood User Experience?

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Author: Carmen Myrick

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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 Introduction

How to Use the Sales in the Redwood UX Roadmap

This guide gives implementers a roadmap for setting up a new implementation and configuration of Oracle Sales in the Redwood User Experience (Sales in the Redwood UX). The steps are aimed at customers implementing Sales in the Redwood UX for the first time, not for those migrating from classic Sales to Redwood.

To use this guide, follow the roadmap in Chapter 2, Review the Roadmap to Sales in the Redwood UX. Each topic in the roadmap provides brief information about the functionality being implemented and links to the setup information.

Video Introductions Sales in the Redwood UX

View these video introductions to get a comprehensive overview of the benefits and capabilities of Sales in the Redwood UX.

- *Consumer Grade +*
- *Introduction to Oracle Sales Cloud*
- *Demonstration of the Redwood Sales experience*
- *Too busy to consume training, this is a quick start video to opt-in to Redwood Sales* **Note:** Not required after Update 23D
- *How to think about adopting Redwood UX (Design Thinking)*
- *Anatomy of a Redwood Sales app*

2 Review the Roadmap to Sales in the Redwood UX

Step 1: Complete Service Admin Action List, Welcome Email, and Sign In

Complete these steps initially:

1. Before you sign in for the first time, complete the actions listed in the Service Administrator Action List provided by Oracle, and create your account with *My Oracle Support*.
2. If you haven't done so already, sign in and reset your temporary password. You click the user initials in the global header on the Welcome page, and select **Set Preferences** from the menu.

See *What do I do after I get my welcome email?* for more information.

Step 2: Enable the Sales and Service Offerings

Enable the Sales and Service offerings for implementation. The Service offering includes tasks required to set up the telephony integration for Sales. See *Enable Sales and Service Offerings and Functional Areas* for steps.

Step 3: Get the Latest Fusion Components Installed

Sales in the Redwood UX leverages the latest Fusion microservices and infrastructure components. Contact *Oracle Support* to request installation of these components. Ask for "Spectra", which is the internal name of these components. After installation, *Enable Sales in the Redwood UX*.

Step 4: Run the Setup Assistant

If you're a new Oracle Sales customer, the easiest way to get many of the initial steps done is to run the Setup Assistant. Get started with *Overview of the Setup Assistant*.

Step 5: Set Up Users

You'll need setup and transactional users in your Sales in the Redwood UX application. Setup users you typically create manually in the application. One setup user is provided for you. Transactional users (called sales resources) who interact with the objects like opportunities, accounts, and leads, are part of your resource hierarchy. You can either create them manually in the UI or import them. To get started, see *Overview of Users and Security*.

Step 6: Set Up Adaptive Search

Adaptive Search is the search engine for Workspace. It's required for Sales in the Redwood UX. The Adaptive Search standard configuration is enabled by the Setup Assistance. For many customers this is all you need to do. But if you want to select which objects to enable, or control which fields are indexed in the search engine, then you'd do this setup task. To implement Adaptive Search, get started *here*.

Step 7: Set Up Access Groups

Access groups let you give users more (or less) permissions when interacting with Sales data. The permissions are recognized by the applications separately from the supplied data security policies that come bundled in each user role. Access Groups are a prerequisite to Oracle Adaptive Search. To get started with access groups, see *Enable Access Groups*.

Step 8: Configure the Activity Stream

Sales in the Redwood UX tracks and displays a broad range of activities for each record. Activities are essentially a history of interactions on records. Items tracked include email exchanges, notes, call logs, past and future tasks and appointments, as well as recent updates to the record itself. Start your configuration with *Overview of Activities Setup*.

Step 9: Set Up the Accounting Calendar

While the Setup Assistant completes the accounting calendar creation and enables it, you can review the accounting calendar the Setup Assistant created for you. See *Create and Review the Accounting Calendar* for details.

Step 10: Set Up Geographies

Setting up geographies is important for data entry. They make it possible for you to set up validation for addresss. See *Import Geography Reference Data* for details.