Oracle Fusion Cloud Sales Automation

Configuring Sales for B2C

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Author: Kristin Penaskovic

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1 About This Guide

Audience and Scope

This guide provides information on how sales administrators and managers can configure their applications for use with a Business to Consumer (B2C) environment.

Read this guide to learn how to configure your applications for use in a B2C environment, including minor modifications required to the springboard and to the following objects:

- Contact
- Opportunity
- Activity
- Lead

Related Guides

You can refer to the following guides to learn more about configuring your applications.

Guide	Description
Configuring Applications Using Application Composer	Describes how to use Application Composer to modify and configure your applications.
Groovy Scripting Reference	Explains the basics of how to use the Groovy scripting language to enhance your applications.

Related Topics

- Oracle Help Center

2 Configure Simple B2C

Configure Your Sales Applications for B2C

Regardless of the type of sales environment you're in (whether business-to-business (B2B) or business-to-consumer (B2C)), almost no changes are required when implementing your sales applications.

If you're in a B2C sales environment, there are just a few additional configuration steps in the area of account and contact management that you should do. Make these minor changes so that your users can sell directly to individual people (consumers, also known as contacts) and not to businesses or corporations (accounts). Read this guide to learn how to enable a simple B2C deployment of your sales applications. Simple B2C means that you're selling only to contacts, not to households.

Overview of B2C Configuration Steps

If your users (or partners) are selling directly to individual people in a B2C environment, then you should make the same set of changes across the objects listed below.

- Contact
- Opportunity
- Activity

Specifically, to track people instead of accounts, you should make these changes. These changes are described in more detail in the rest of this guide.

1. For each object, change the name of the Account field to something that makes sense for your business.

   In a B2C environment, you're selling to people, not to accounts. You should still use the Account field, but you should change the field label to something that works for you. For example, do you refer to the people you sell to as clients? If so, then change the name of the Account field to Client.

   > **Tip:** You might need to rename additional fields as well. For example, you might want to rename the Account Phone Number field to Client Phone Number.

2. Set the default value for the Customer Type field.

   The Customer Type field indicates the type of customer you have: account, contact, or household. In a simple B2C configuration, you're not selling to accounts or households, so you should set the default value to Contact and hide the actual Customer Type field from users so they can't change the value.

   The default value that you set for the Customer Type field controls which search and select dialog box displays in the Account field (which you have renamed to Client or Customer or whatever works for your business). If you set the default value for the Customer Type field to Contact, then the Search and Select: Contact list of values displays at runtime when your users want to search for and select a customer or client.
3. If you use the concept of both customers and prospects, then unhide the Type field on the Contact set of pages, and disable the Contact value in the field's underlying lookup type. Your contacts will be either customers or prospects.

4. Hide any fields that aren't applicable to individual people, and unhide fields that are applicable to individuals but are hidden by default.

   For example, you might want to do the following:

   - Unhide the Marital Status field on the Contact set of pages. This field might be important for individuals.
   - Hide the Account field on the Contact set of pages. This field is for B2B contacts.
   - Hide the Primary Contact field on the Opportunity set of pages. This field is typically not applicable in simple B2C where you sell to a single contact.
5. Change the springboard and Navigator to hide the Accounts icon, since you're not selling to accounts.

Changes Required for the Lead Object

Note that you should make slightly different changes for the Lead object. For the Lead object, the Account field is already separate from the Contact field, so there is no renaming of the Account field required. However, two Account fields and two Contact fields are delivered for your use. In a simple B2C environment, you don't need the two Account fields, so complete these steps for the Lead object:

- Hide the Existing Account field, and confirm that the New Account field is hidden, on the Lead set of pages. In a simple B2C environment, you don't need to show the Account fields.
- Confirm that the Existing Contact field is displayed. This field lets your users search for and select an existing contact to associate with a lead.
- If you want your users to be able to manually type in new contacts, then unhide the New Contact field. This field is a manual text input field and is delivered automatically hidden in standard Lead page layouts.

Read this guide for more details about how to make these changes in the application.

Rename the Account Field for Each Object

In a B2C environment, you're selling to people, not to accounts. You can still use the Account field, but you should change the field label to something that works for you.

For example, do you refer to the people you sell to as clients? If so, then change the name of the Account field to Client. Rename the Account field for the Activity, Contact, and Opportunity objects. Read this topic to learn how to rename the Account field using Application Composer.

Rename the Account Field

To rename the Account field:

1. Navigate to Application Composer and expand **Standard Objects**.
2. Expand the **Activity** object.
3. Click the **Fields** node.
4. Click the **Standard** tab to view the standard fields available for the Contact object.
5. Click the **Account** field.
6. On the **Edit Standard Field: Account** page, change the display label from Account to something that makes sense for your B2C context.
7. Click **Save and Close**.
8. Repeat this procedure for these additional objects:

- Contact
- Opportunity

Set the Default Customer Type

This topic describes how to set the default value for the Customer Type field.

The Customer Type field indicates the type of customer you have (account, contact, or household), and controls which search and select dialog box displays in the Account field (which you have previously renamed). In a simple B2C configuration, you should set the default value of the Customer Type field to Contact and confirm that the actual field is hidden from users so they can't change the value. At runtime, when your B2C users search for and select customers, they will see a list of contacts (and not accounts).

To configure the Customer Type field so that it's compatible with B2C, you should:

1. Set the default value for the Customer Type field.
2. Confirm that the Contact search and select dialog box displays at runtime from the Account field.
3. Confirm that the Customer Type field is hidden from users.

Set the Default Value for the Customer Type Field

The value in the Customer Type field controls which search and select dialog box displays in the Account field (which you have previously renamed to Client or Customer or whatever works for your business). If you set the default value for the Customer Type field to Contact, then at runtime when your users want to search for and select a customer or client in the newly renamed Client field, the Select: Contact dialog box displays.

1. In the Setup and Maintenance work area, select the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Standard Lookups
2. Enter `ZCA_RECORD_TYPE` in the **Lookup Type** field and click **Search**.
3. Deselect the **Enabled** check box for the **ORGANIZATION** lookup code (**Account** meaning).
4. Confirm that the **PERSON** lookup code (**Contact** meaning) has the lowest display sequence number. The value with the lowest display sequence number is the default value.
5. Click **Save and Close**.

Confirm that the Contact Search and Select Dialog Box Displays

After you set the default value for the Customer Type field to Contact, confirm that the Select: Contact dialog box displays in the Account field (which you have renamed to something else).

1. Navigate to the create or edit pages for the **Activity** object.
2. In the **Account** field, now renamed to Client or Customer (or whatever you selected), click the down arrow and then click **Search**.

   The Select: Contact dialog box should display.
3. Repeat this procedure for these additional objects:
   - Opportunity

- Sales Lead

Confirm that the Customer Type Field is Hidden

After you set the default value for the Customer Type field, confirm that this field isn't displaying at runtime to any users. In a simple B2C configuration, you're not selling to accounts or households, so users don't need to change the value.

1. Navigate to Application Composer and expand **Standard Objects**.
2. Expand the Activity object and click the **Pages** node.
3. On the Simplified Pages tab, review each active page layout to confirm that the Customer Type field is hidden. The Customer Type field should be in the Available Fields list, not in the Selected Fields list.
4. Repeat this procedure for these additional objects:
    - Opportunity
    - Sales Lead

Set the Default Contact Type

When you sell directly to people, sometimes you might want to make a distinction between contacts who are prospects vs. contacts who are actual customers.

If you use the concept of prospects, then you should unhide the Type field on the Contact set of pages so that your users can indicate if a contact is either a prospect or a customer. This topic explains how to do this.

In a simple B2C configuration, you should set the default value of the Type field to Prospect and disable the Contact value. (A contact of type Contact is a B2B concept, and it's not used in B2C.) Also, confirm that the Type field is displayed to users. At runtime, your B2C users can optionally change the type of contacts from prospects to customers.

To configure the Type field on the Contact object so that it's compatible with B2C, you should:

1. Disable the Contact value for the Type field.
2. Set the default of the Type field on the Contact object to Prospect.
3. Unhide the Type field on the Contact set of pages.

Disable the Contact Value on the Type Field

1. In the Setup and Maintenance work area, select the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Standard Lookups
2. Enter `ZCA_CONTACT_TYPE` in the **Lookup Type** field and click **Search**.
3. Deselect the **Enabled** check box for Contact.
4. Click **Save and Close**.

Set the Default Contact Type to Prospect

1. In the Setup and Maintenance work area, select the following:

    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Administrator Profile Values
2. Click the Manage Administrator Profile Values item.
3. In the **Profile Option Code** field, enter `ZCA_DEFAULT_CONTACT_TYPE` and click **Search**.
4. In the **Profile Value** drop-down list, select **Prospect**.
5. Click **Save and Close**.

Confirm that the Contact Type Field is Displayed

After you set the default value for the Type field, confirm that this field displays at runtime.

1. Navigate to Application Composer and expand **Standard Objects**.
2. Expand the Contact object and click the **Pages** node.
3. On the Simplified Pages tab, review each active page layout to confirm that the Type field is displayed. The Type field should be in the Selected Fields list, not in the Available Fields list.

Configure Leads for B2C

To configure most sales objects for B2C, you must rename the Account field to something that works for your business, like Customer or Client. The Sales Lead object, however, is already delivered with two separate Account fields and two separate Contact fields.

This means that it's not necessary to rename the Account fields for the Sales Lead object. Instead, you only have to hide them from Lead Management page layouts.

To configure the Sales Lead object so that it's compatible with B2C, you should:

1. Hide the Existing Account field, and confirm that the New Account field is hidden, on the Lead set of pages. In a simple B2C environment, you don't need to show the Account fields.
2. Review the two Contact fields to confirm their display settings. The Existing Contact field should be automatically displayed already. You might want to display the New Contact field if your users enter net new leads.

Hide the Account Fields

1. Navigate to Application Composer and expand **Standard Objects**.
2. Expand the Sales Lead object and click the **Pages** node.
3. On the Simplified Pages tab, review each active page layout to confirm that both the Existing Account and New Account fields are hidden. Both fields should be in the Available Fields column, not in the Selected Fields column.

Review the Contact Fields

1. Navigate to Application Composer and expand **Standard Objects**.
2. Expand the Sales Lead object and click the **Pages** node.
3. On the Simplified Pages tab, review each active page layout to confirm that the Existing Contact field is in the Selected Fields column, not in the Available Fields column.

This field lets your users search for and select an existing contact to associate with a lead.

4. If you want your users to be able to manually type in new contacts, then make sure that the New Contact field is also in the Selected Fields column.

   This field is a manual text input field and is delivered automatically hidden in standard Lead page layouts.

Display Hidden B2C Fields

In a B2C environment, you're selling to people, not to accounts. Review all fields on the activity, contact, opportunity, and sales lead objects to determine if any fields are applicable to individuals but might be hidden by default.

At the same time, there are some fields that might not be applicable to individuals, so you should hide those. This topic provides a brief overview of how to hide and show fields, and offers some tips on what kinds of fields you should look for.

Display Hidden B2C Fields

Review the standard fields on the activity, contact, opportunity, and sales lead objects that are hidden by default, and consider which fields might be important for individuals.

1. In Application Composer, navigate to the activity, contact, opportunity, or sales lead object, and click the Pages node.
2. On the Simplified Pages tab, copy each standard page layout that exists for the object so that, in the resulting custom layout, you can review the fields that are hidden by default. Hidden fields are listed in the Available Fields column.
3. If you find a field that makes sense for individuals and you want to display it, then make a note of it. Complete this analysis for each standard page layout that exists for the object.

   For example, the Marital Status field on the contact object is hidden by default in all standard page layouts. This field might be useful information to track, so you might want to display it on the contact set of pages.
4. After completing your initial analysis, navigate to an existing custom page layout, or create a new layout.
5. On each custom page layout, double-click each field that you noted in the previous step to move the field to the Selected Fields column.
6. Save each layout.
7. Navigate to the runtime set of pages for each object to confirm that the fields you added are now displaying.

Hide Fields for B2C

Some fields are displayed by default which you should hide when selling directly to individuals.

1. Review the runtime set of pages for the activity, contact, opportunity, and sales lead objects, and consider which fields are not applicable to individuals. Make a list of the fields that you want to hide.

   For example, on the Contact set of pages, you should hide the Account field because you don't typically assign an account to B2C contacts. The Account field is for B2B contacts. On the Opportunity set of pages, you should hide the Primary Contact field. This field is typically not applicable in simple B2C where you sell to a single contact.
2. In Application Composer, navigate to the activity, contact, opportunity, or sales lead object, and click the Pages node.
3. On the Simplified Pages tab, create a custom page layout for each page type, or edit an existing custom layout.

4. On each custom page layout, double-click each field that you noted in the previous step to move the field to the Available Fields column. This action hides the field from display at runtime.
5. Save each layout.
6. Navigate to the runtime set of pages for each object to confirm that the fields you removed from the Selected Fields column are now hidden.

Hide Accounts from the Springboard and Navigator

This topic describes how to hide the Accounts item so that it's not visible on the springboard and Navigator. In a B2C environment, you're selling to people, not to accounts, so we don't need to display this icon.

Hide Accounts from the Springboard and Navigator

1. Navigate to **Structure** under the Configuration menu in the Navigator.
2. Expand **Sales**.
3. Click **Accounts**.
4. Select **No** in the **Show on Navigator** list.
5. Select **No** in the **Show on Springboard** list.
6. Click **Save and Close**.

Households

Extend Pages for Households

Using Application Composer, you can change many items that appear on the pages for households.

Use Application Composer to modify the following pages:

- Households landing page
- Create Household page
- Edit Household page

For example, you can:

- Hide or show standard fields.
- Set fields as required.
- Set field default values.
- Reorder columns.
- Change column labels.
- Add custom fields (all types).

Note: To extend the application set of pages for households, use the Household object in Application Composer.

Households Landing Page

You can modify the Households landing page, also referred to as the Households list page. For example, you can hide standard household fields or show custom household fields. To modify the Households landing page:

1. Navigate to the Household object in Application Composer.
2. Select the Pages node.
3. On the Application Pages tab, click **Edit Summary Table for Household**.

Create Household Page

You can modify the Create Household page. For example, you can hide standard household fields, make a field required, add a default value, and show custom household fields. To modify the Create Household page:

1. Navigate to the Household object in Application Composer.
2. Select the Pages node.
3. On the Application Pages tab, under Creation Page Layouts, duplicate the standard layout to create a new layout to edit. Or, edit another existing layout.

   To enhance runtime usability for your end users, optionally group custom fields into field groups.

> **Note:** Custom fields that you add to the Household object and then select for display in a page layout appear on the Create Household page, before the address set of fields.

Edit Household Page

The Edit Household page consists of multiple subtabs that display along the left side of the page. You can modify most of these subtabs. For example, you can also add custom subtabs to display records from child or related objects.

To add custom fields to certain subtabs available from the Edit Household page, you must first navigate to those subtab target objects in Application Composer to create the fields. After creating the fields on the target object, you can then navigate to the required details page layout for the Household object to add those fields to the relevant subtabs.

To modify the Edit Household page:

1. Navigate to the Household object in Application Composer.
2. Select the Pages node.
3. On the Application Pages tab, under Details Page Layouts, duplicate the standard layout to create a new layout to edit. Or, edit another existing layout.
4. When making changes to the Edit Household page, select the subtab you want to change first. The following subtabs are available from the Edit Household page. Use the following subtabs to configure which standard and custom fields display at run time.

   The changes you make to these subtabs are unique to the Edit Household page. For example, the changes you make to the Opportunities subtab on the Edit Household page are not reflected on the Opportunities subtab on the Edit Contact page.

   - Overview
   - Profile
   - Team

     Use the Sales Account Resource and Sales Account Territory objects to create custom fields as needed.

- Assets

  Use the Asset object to create custom fields as needed.
- Opportunities

  Use the Opportunity object to create custom fields as needed.
- Leads

  Use the Lead object to create custom fields as needed.
- Relationships

  This subtab has both a Household Contacts list as well as an Other Relationships list.

  Use the Contact object to create custom fields as needed, before you configure the Household Contacts list here.

  Use the Relationship object to create custom fields as needed, before you configure the Other Relationships list here.
- Notes

  Use the Note object in Application Composer to create custom fields as needed, and to extend this subtab.

  On the Application Pages tab for the Note object, edit the default creation page layout or duplicate it to create a new layout.

  The Notes list page isn't extensible.
- Activities

  Use the Activity object in Application Composer to extend this subtab.

  On the Application Pages tab for the Activity object, click **Edit Embedded Summary Table** (at the bottom of the page).
- Conversations

  Not extensible from this page.

Enable Household Relationship Views

After you enable the functionality, salespeople can view the relationships that exist among related contacts in a household.

Enable Relationship Views

You can show or hide panels or regions in the Households pages.

Here's how to show or hide the views:

1. Ensure you're working in an active sandbox.
2. Click **Navigator** > **Configuration** > **Application Composer**.
3. In the Objects navigation tree, expand **Standard Objects** and then expand **Household**.
4. Click the **Pages** node.

5. Ensure that the **Application Pages** tab is selected.
6. In the Details Page Layouts region, edit the relevant layout.

   If none exists for editing, then duplicate the standard layout using the duplicate layout icon, and edit the resulting layout.
7. Edit the duplicate layout.
8. Select the **Relationships** subtab, in the Details Layout area.
9. Show or hide the following:
   - Relationship Diagram Panel: This panel shows the graphical representation of the relationships in a household.
   - Household Contacts: This panel provides a list view of the contacts in a tabular format.
   - Other Relationships: Any other relationship appears in this section.
10. Click **Done**.
11. Publish the sandbox.

What happens when I delete a household?

By default sales administrators can delete households.

In general, when you delete a household:

- Any associations with members of the household are severed, but users can still see members as individual organizations or contacts.
- Users can't see contact points for the household.
- Users can't see deleted households in any account or contact lists.

Related Topics