Oracle Fusion Cloud Sales Automation

How do I configure the tracking of activities on each record?

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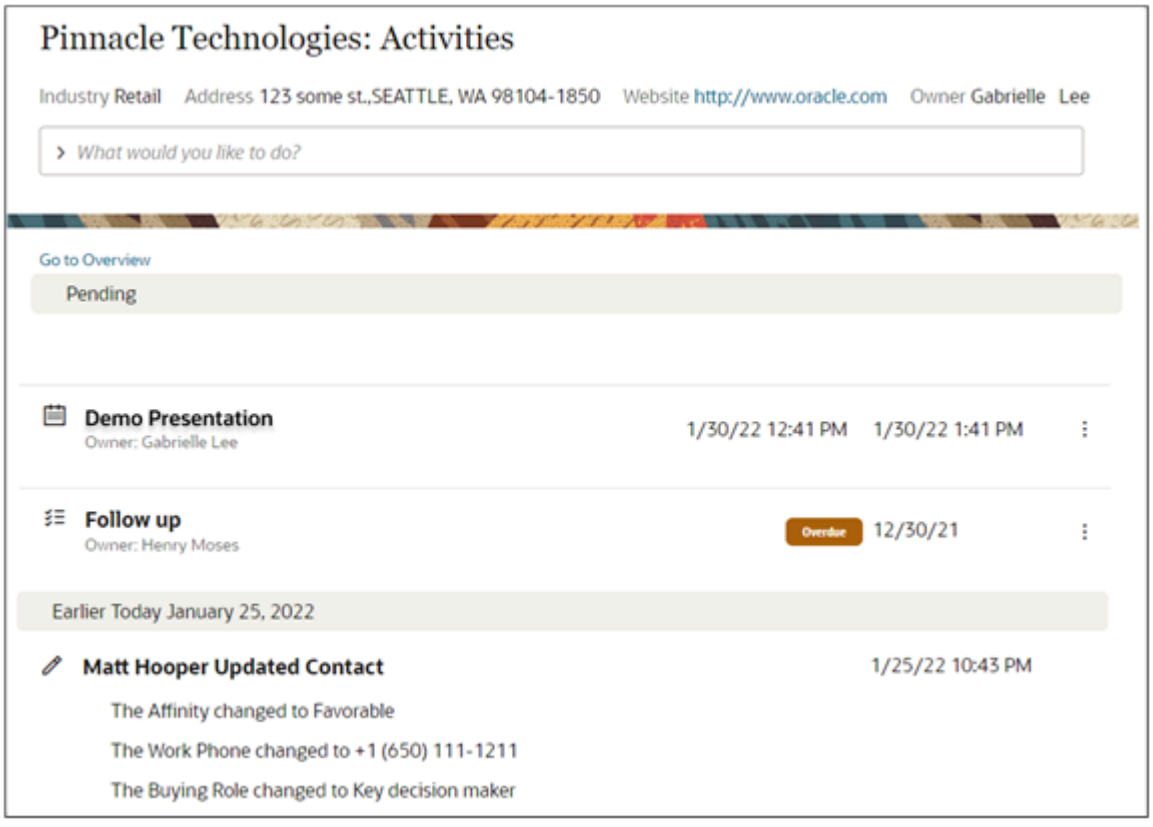
1 How do I configure the tracking of activities on each record?

What Activities Track on Individual Records

Oracle Sales in the Redwood User Experience (Sales in the Redwood UX) tracks and displays a broad range of activities on each record. Activities tracked include email exchanges, notes, call logs, past and future tasks and appointments, as well as recent updates to the record itself. The application tracks these activities on accounts, opportunities, contacts, and leads.

The Activities page on individual records tracks important updates in chronological order, sometimes called the activity stream. For example, the list of activities for an opportunity might show that the opportunity was reassigned to a different owner, that an appointment is scheduled for the next day, or that a task has been created. Administrators can determine what information gets displayed, but don't think of activities as an audit trail. Not all updates are tracked.

Here's a screenshot showing both pending activities and the record of recent updates for a contact. The items in the **Matt Hooper Updated Contact** heading lists the important changes Matt Hooper made to the account during one edit. Each time you save, the application creates another heading with a time stamp.



Overview of Activities Setup

Here's a summary of the steps to specify which activities get tracked for different objects in Oracle Sales in the Redwood User Experience.

Step	Description	Navigation	Where to Get More Details
1	You must create and activate an activities configuration for each object you use in Sales in the Redwood UX. You create an activities configuration by duplicating an existing one. Oracle provides a predefined configuration for each object. To use the predefined configuration, just copy it and activate it. To change what gets displayed in Activities for an object, you can edit your copy before activating it. If you're are a new customer, then the activities configurations for opportunities and service requests were already duplicated and activated for you. But you must still duplicate and activate the rest of the objects.	**Navigator** > **Configuration** > **Configure Activities Display**	See the topic: *Create and Activate an Activities Configuration*
2	Run the **Publish Feed Elements** process to create the index required by Adaptive Search. Don't select the **Production to Test Enabled** checkbox. This checkbox is used for migrating indexes from production to test instances. You run this process only once.	**Navigator** > **Tools** > **Scheduled Processes**	See the topic: *How do I enable the list of activities in each record in Oracle Sales in the Redwood User Experience?*
3	Enable the natural English-language filtering of activities. Using this feature, a salesperson can enter "filter my tasks due tomorrow", to view all tasks due by the end of the next calendar day in their time zone where they're listed as a resource. Like all natural-language processing in Sales, this feature uses Oracle Digital Assistant (ODA) to process the text.	**Setup and Maintenance** > **Sales** > **Digital Assistant** > **Manage Digital Assistant**	See the topics and explanation in this section: *Natural-Language Filtering for Activities*

How You Determine What Shows Up in Activities

You can specify what information displays in Activities for each record by creating an activities configuration in the Configure Activities Display page and activating it. You must create and activate a separate activities configuration for every object.

In the configuration, you can make information visible by checking two checkboxes:

- **Make Available for Display**

  Displays the attribute in activities.

- **Monitor for Changes**

  Tracks changes in the attribute.

You must check both checkboxes for the information to be visible. For many attributes, you check both checkboxes for the same attribute. For example, note text is stored in the NoteTxt attribute. So, to display notes salespeople create any subsequent updates to the note text, you select both check boxes for the NoteTxt attribute:

Attribute	Unique Name	Make Available for Display	Monitor for Changes
Note	NoteTxt	Yes	Yes

To display information from certain fields, including dynamic choice list fields and fixed choice list fields, you must check the check boxes for different attributes. That's because the information that displays in the UI comes from the name column while the tracking of changes comes from the ID column. For example, if you're displaying the owner of a task, a dynamic-choice list field, there are two attributes at play:

- Owner
- Owner Party ID

The Owner field stores the name of the person identified by the Owner Party ID. You want to display the owner name in the UI, but you have to monitor the Owner Party ID to see if a new owner has been assigned. Here are the settings you make for displaying the owner:

Attribute	Unique Name	Make Available for Display	Monitor for Changes
Owner	OwnerName	Yes	No
Owner Party ID	OwnerPartyID	No	Yes

Some information displayed in the UI, such as the postal address, come from aggregating multiple fields. The attribute `FormattedAddress` displays the address in the UI. `FormattedAddress` is composed of many elements, including country, state, city, province, street address, and so on. There are different fields involved in different formats for each country, which you can review using the setup task Manage Formatted Addresses. Presumably, you want to display the changed address if any of address elements are updated. For that to happen, you must check the **Monitor for Changes** checkbox for all the address elements you're using and check the **Make Available for Display** checkbox for the `FormattedAddress` attribute. Here are the settings for just some of the available address fields:

Attribute	Unique Name	Make Available for Display	Monitor for Changes
Address Line 1	AddressLine1	No	Yes
Address Line 2	AddressLine2	No	Yes
Building	Building	No	Yes
City	City	No	Yes
Country	Country	No	Yes
Postal Code	County	No	Yes
State	State	No	Yes
Address	FormattedAddress	Yes	No

If you check **Make Available for Display** for any of the address components, then you'd also see an entry for that component as well. Suppose, for example, you check **Make Available for Display** for City:

Attribute	Unique Name	Make Available for Display	Monitor for Changes
City	City	Yes	Yes
Address	FormattedAddress	Yes	No

The Activities would display two lines when the city is updated. For example:

- Address changed to 100 Main Street, New York, NY 10021
- City changed to New York

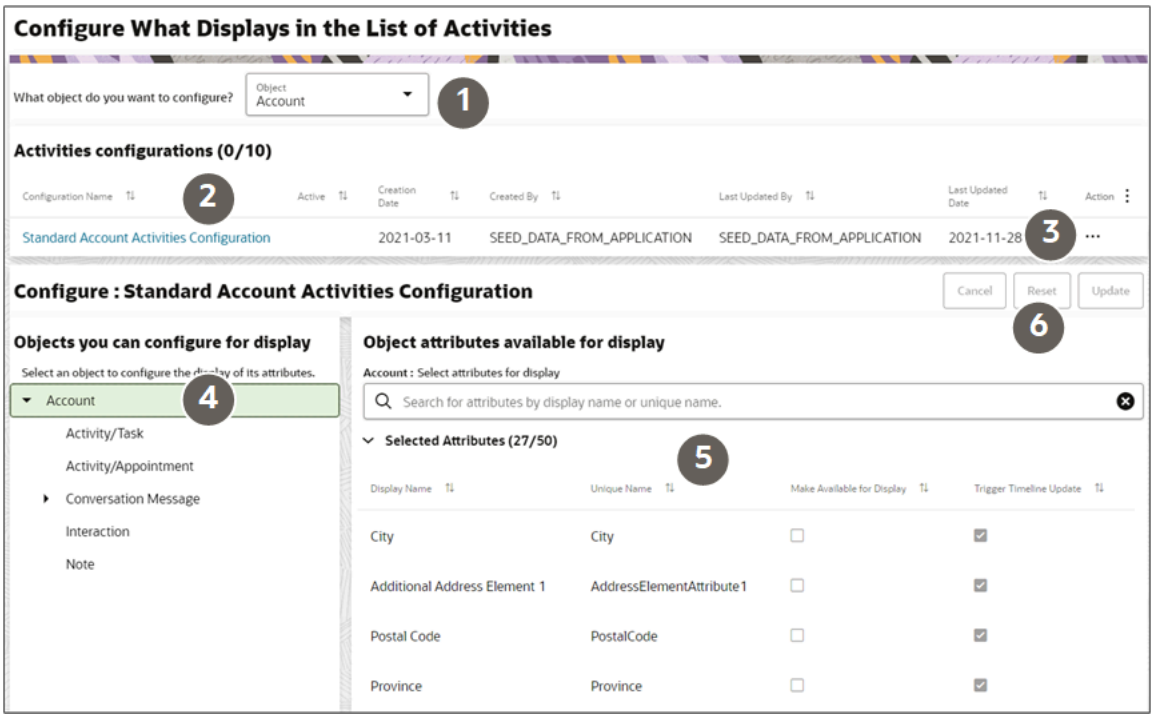
Anatomy of the Configure Activities Display Page

Using the Configure What Displays in the List of Activities page, you can configure what information shows up in the list of activities for each business object and which activity updates trigger an entry in the time line.

Here's an overview:

Callout	Description
1	Select the object you want to configure.
2	List of available configurations. You can have as many as 10 per object. **`SEED_DATA_FROM_APPLICATION`** indicates the configuration provided by Oracle. You can't edit the predefined configuration, but you can duplicate it and edit the duplicate.
3	Actions you can take on a configuration: • Duplicate a configuration • Edit a configuration you created. • Delete a configuration you created.

Callout	Description
	• Activate a configuration.
4	Select an object to view its attributes.
5	Attributes of the selected object. Those that are selected and those that are available.
6	When you edit a configuration, you can: • Save your changes by clicking **Update**. • Revert to the previous saved version by clicking **Reset**) • Discard the edits you made in the configuration by clicking **Cancel**



Create and Activate an Activities Configuration

You must create and activate an activities configuration for each object you use in Sales in the Redwood UX. You create an activities configuration by duplicating an existing one. Oracle provides a predefined configuration for each object. To use the predefined configuration, just copy it and activate it. To change what gets displayed in Activities for an object, you can edit your copy before activating it.

You must have the Manage Feed Configurations duty role to be able to duplicate, edit, delete, and activate a configuration. Users with the Access View Feed Configurations duty role can only view the configurations.

Note:

- You can't edit or delete configurations provided by Oracle.
- You can have only one active configuration for each object.
- You can't delete an active configuration.
- You can create a maximum of 10 custom configurations for each object.
- You can enable Monitor for Changes for a maximum of 50 attributes for each object in a configuration.

1. Click **Navigator** > **Configuration** > **Configure Activities Display**.
2. Select a sales object you want to configure.
3. In the **Activities configurations** section, select an existing configuration. Oracle provides one standard configuration for each object. Look for `SEED_DATA_FROM_APPLICATION` in the Created By column.
4. In the Action column (the last column), click **Actions** (three dots) and select **Duplicate**.
5. In the Duplicate dialog, enter a name for your configuration and an optional description.
6. Click **Duplicate**.
7. Click the new configuration name to display its attribute setup.
8. To use the configuration provided by Oracle, then skip steps 9 through 11 and activate the configuration as described in step 12.
9. To change the way attributes display first, then click **Actions** and select **Edit**.
10. Configure the attributes:
    a. Select one of the objects you want to configure for display on the left pane.
    b. In the right pane, find the attribute you want to update and set the two parameters:
        - **Make Available for Display**: Makes a field available for display on the UI.
        - **Monitor for Changes**: Monitors the field for updates.
11. When you're done, click **Update**.
12. To make your configuration active, click **Actions** (the three dots) and select **Activate**. You must then confirm that you want to activate it.

Use **Actions** (the three dots) menu to activate, delete, duplicate, and update your configurations.

How do I enable the list of activities in each record in Oracle Sales in the Redwood User Experience?

When you set up Sales in the Redwood UX for the first time – and each time you import new sales records – you must run the Publish Feed Elements scheduled process to enable the Activities panel and subview for each record. The process publishes the indexes required for Oracle Adaptive Search to track activities for all objects that have activities enabled. You can't run the process separately for individual objects.

Which Records Get Populated with Activities

The Publish Feed Elements process populates activities in records that meet the following criteria:

Object	Criteria
Lead	Lead status equals Unqualified or Qualified and the lead was updated in the last 180 days
Opportunity	Opportunity status is Open and the opportunity was updated in the last 300 days
Account	All accounts of type Customer and Prospect with any tasks and appointments added in the last 300 days
Contact	All contacts that were updated in the last 300 days.

The process also populates activities for child objects of the objects that meet the above criteria:

Lead Objects

Child Object	Criteria
Activity Type = Appointment	All activities of type Appointment that haven't passed the due date. All activities of type Appointment that have passed a due date 60 days from current date.
Activity Type = Task	All activities of type Task that have the following status: Not Started, In Progress, and On Hold. All tasks in the Completed status that passed a due date 60 days from current date.
Notes	All available notes that were created or updated in the last 60 days.
Audit Log	Audit log that shows the Created By and Updated By information for the Lead record.

Contact Objects

Activity Type = Appointment	All activities of type Appointment that haven't passed the due date. All activities of type Appointment that have passed a due date 180 days from the current date.
Activity Type = Task	All activities of type Task that have the following status: Not Started, In Progress, and On Hold. All tasks in Completed status that has passed the due date 180 days from current date
Notes	All available notes that were created or updated in the last 180 days.
Audit	Audit log that shows the Created By and Updated By information for the Contact record.

Opportunity Objects

Activity Type = Appointment	All activities of type Appointment that haven't passed the due date. All activities of type Appointment that have passed a due date 180 days from current date.
Activity Type = Task	All activities of type Task that have the following status: Not Started, In Progress, and On Hold.

Notes	All available notes that were created or updated in the last 180 days.
Audit	Audit log that shows the Created By and Updated By information for the Opportunity record.

Account Objects

Activity Type = Appointment	All activities of type Appointment that haven't passed the due date. All activities of type Appointment that have passed a due date 180 days from current date.
Activity Type = Task	All activities of type Task that have the following status: Not Started, In Progress, and On Hold.
Notes	All available notes that were created or updated in the last 180 days.
Audit	Audit log that shows the Created By and Updated By information for the Account record.

Service Request Objects

Audit	Audit log that shows the Created By and Updated By information for the service request record.
Messages	All service request messages of the following types: • Customer Entry • Response • Internal Note • Forwards • System Note • System Response
Interactions	Interactions for all service requests where `StatusCd = "ORA_SVC_CLOSED" AND ChannelTypeCd IN [ "ORA_SVC_CHAT","ORA_SVC_PHONE"]`

Update the Initial Run Date to Ensure Your Records Are Processed

The Publish Feed Elements process uses the date that you first run the process to identify which records to index. For example, only leads that were updated in the last 180 days before the run date are indexed. If you first ran this process on 2023-06-30, then the all the leads in the prior180 days are processed (leads from 2023-01-01 to 2023-06-30). If you're running the process more than 180 after the initial run date, then your records won't get processed unless you update the stored run date. Here's how to update the date:

1. Open Setup and Maintenance.
2. Open the side panel and click **Search**.
3. Search for the task Manage Profile Options and open it.
4. On the Manage Profile Options page, and in the Search results section, click **New** (the plus sign).

5. In the Create Profile Option page, make the following entries:

Field	What to Enter
Profile Option Code	ZCA_FEED_DAY0_START_DATE
Profile Display Name	Day 0 Start Date
Application	Common CRM
Module	Common CRM

6. Click **Save and Close**.
7. Open the **Manage Administrator Profile Values** task.
8. Search for the profile option you just created by its code: ZCA_FEED_DAY0_START_DATE.
9. In the Profile Values section, enter a more recent date in the format: YYYY-MM-DD, for example: 2024-06-30.
10. Click **Save and Close**.

How to Run the Publish Feed Elements Process

Note: You must run this process once during initial Sales setup and any time you import sales data that create records in your Sales application.

1. Click **Navigator** > **Tools** > **Scheduled Processes**.
2. On the Scheduled Processes Overview page, click **Schedule New Process**.
3. Leave the type as **Job**.
4. In the Name field, type **Publish Feed Elements**, and press **Enter**.
5. Make sure that the **Production to Test Enabled** checkbox is unselected. You use this option only if you want to migrate the activity indexes from production to test as part of your data migration.
6. Continue to the next steps. You can also skip to the steps and submit to run the process once as soon as possible with the default output.

Migrate Index of Activities from Production to Test

To migrate the index created for activities from your production environment to a test environment, you must run the Publish Feed Elements process in the production environment with the Production to Test Enabled checkbox selected.

Before you run the Publish Feed Elements process in the production environment, make sure you've completed the following:

- You've set up activities in the environment as outlined in the *Overview of Activities Setup*.
- You've created an activities configuration in both production and test.
- You've run the Publish Feed Elements process in the test environment.

Note: If Data Masking is enabled during the Production to Test process, all your activities generated for the objects are deleted. You must run the Publish Feed Elements process again after the production to test process completes to populate the activity stream with the masked data.

Natural-Language Filtering for Activities

You can make it possible for salespeople to use English-language expressions in the Action Bar to filter the list of activities. For example, entering "filter my tasks due tomorrow", displays all the tasks due by the end of the calendar day in your time zone where you're listed as a resource. Entering "filter communications about pricing", displays all emails threads and phone logs with the keyword pricing.

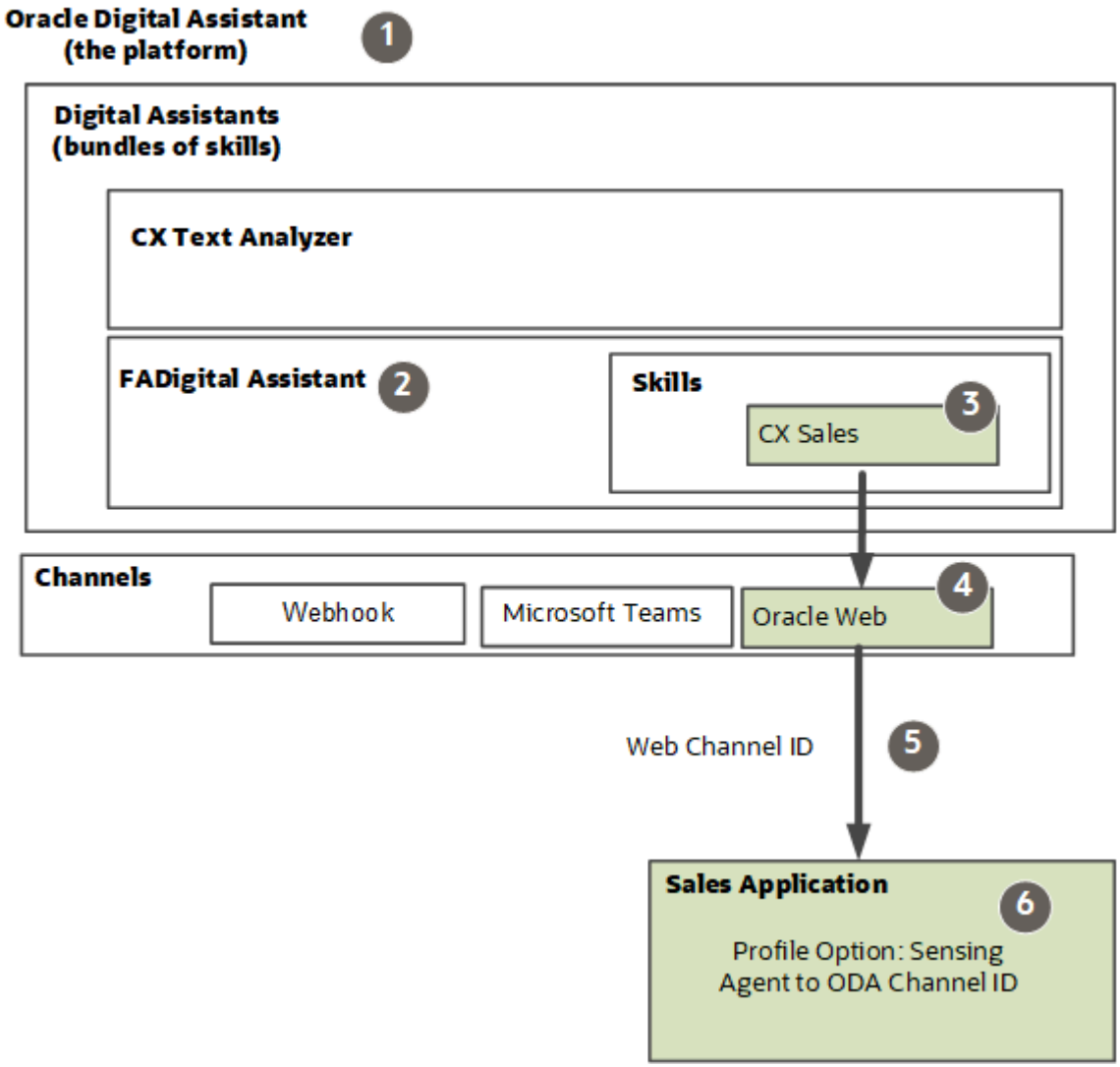
Without the natural language processing, you must select one of the predefined filters and then use keywords for the rest of the search.

Oracle Digital Assistant and Activity Filtering

Natural language filtering uses the text analysis features of Oracle Digital Assistant (ODA) just like the other natural language features in Sales. Here's a brief overview of concepts and tasks to help you with your implementation.

Overview of Oracle Digital Assistant Integration Elements for Activities Filtering

Callout	Description
1	The ODA platform that's used to create different natural language analysis skills. The skills are bundled into digital assistants.
2	For activities filtering, you use the`FADigitalAssistant` digital assistant.
3	`FADigitalAssistant` includes multiple skills, including CX Sales, Help Desk, and HCM Knowledge. For activities filtering, you use the CX Sales skill.
4	You connect the skills in ODA to the sales application, by creating different types of channels. For activities filtering, you create an Oracle Web channel.
5	After you create and activate the channel, you copy its Web Channel ID.
6	You paste the Web Channel ID into the profile option Sensing Agent to ODA Channel ID (ORA_ZCA_SENS_ODA_CHANNEL_ID).



Overview of Natural-Language Filtering Setup for Activities

Here's an overview of the setup tasks that make it possible for salespeople to use the English language to filter activities.

Step	Setup Task	Application	Description	Where to Get More Details
1	Complete the prerequisite Oracle Digital Assistant application setup.	Oracle Identity Cloud Service (IDCS)	Before you set up any of the features that use natural language processing, you must perform some prerequisite setup of Oracle Digital Assistant:	See the topic: *Overview of Common ODA Setup for Sales*.

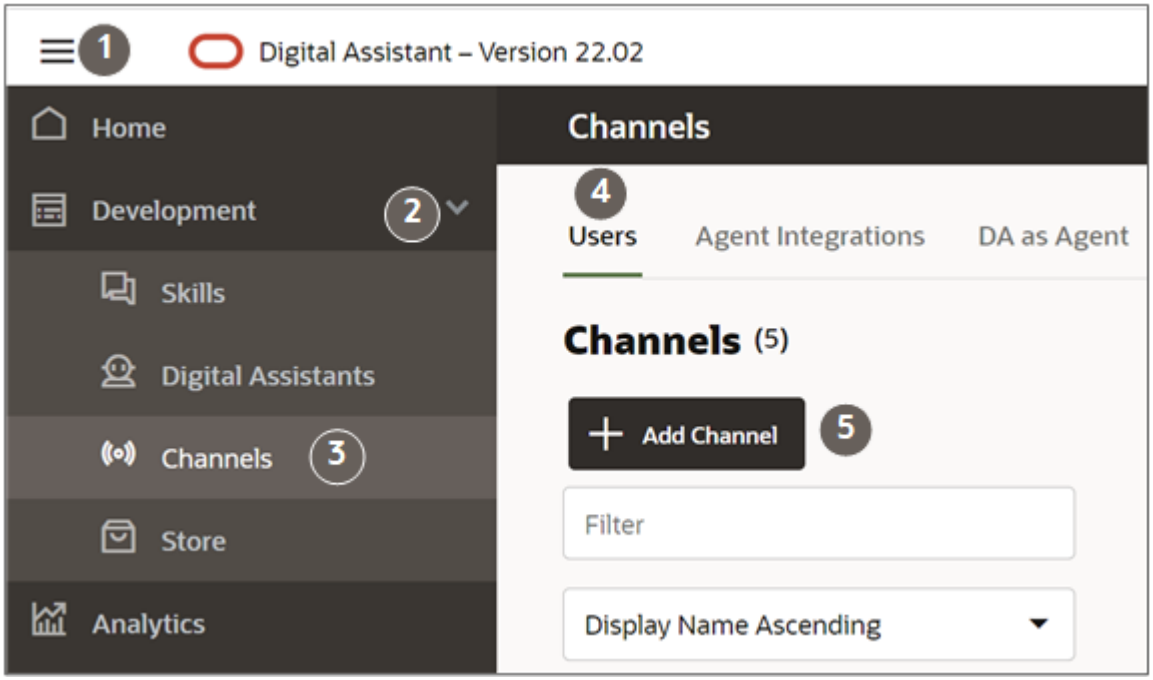
Step	Setup Task	Application	Description	Where to Get More Details
			• Set up administrator users • Obtain the ODA URL • Install (pull) the FADigitalAssistant. • Enable the Digital Assistant used for Oracle Fusion Cloud Applications	
2	Create the Oracle Web channel to sales	Oracle Digital Assistant	Create the Oracle Web channel that enables the analysis of the text salespeople enter in the Action Bar. After you create the channel, you copy the Webhook URL. You need it for the next step.	See the topic: *Create an Oracle Web Channel*
3	Associate the Oracle Web channel that you created to the sales application.	Sales application	Paste the Web Channel ID into the profile option Sensing Agent to ODA Channel ID (ORA_ZCA_SENS_ODA_CHANNEL_ID).	See the topic: *Enter the Channel ID into a Profile Option to Enable Activity Filtering*

Create an Oracle Web Channel

Create an Oracle Web channel to send what salespeople enter in the Action Bar to Oracle Digital Assistant for natural-language processing.

1. Navigate to the Setup and Maintenance work area and select the **Sales** offering.
2. In the **Functional Areas** pane, click **Digital Assistant**.
3. In the **Task** pane, click the **Manage Digital Assistant** task.

4. On the Oracle Digital Assistant home page, click the **Navigator** (the hamburger menu highlighted by callout 1).



5. Expand the Development menu item (callout 2).
6. Click **Channels** (callout 3).
7. Make sure that the **Users** tab is selected (callout 4).
8. Click **Add Channel** to open the Create Channel window (callout 5).
9. Make these entries in the Create Channel window:
    a. Give your channel a name.
    b. Select **Oracle Web** as the channel type.
    c. In the Allowed Domains field, enter ***.
    d. Disable **Client Authentication Enabled**
    e. Click **Create**.
10. In the Route To field, select the **CX Sales** skill from the `FADigital Assistant` that you pulled from the store earlier.
11. Scroll to the **Channel ID** field and copy the value. You must enter the value in the profile option Sensing Agent to ODA Channel ID (ORA_ZCA_SENS_ODA_CHANNEL_ID).
12. Enable **Channel Enabled** at the top of the page.

Enable Activity Filtering

To enable the activity filtering, enter the Channel ID from the Oracle Web channel you created in the profile option, Sensing Agent to ODA Channel ID (ORA_ZCA_SENS_ODA_CHANNEL_ID).

1. Go to: **Setup and Maintenance** > **Sales offering** > **Sales Foundation functional area** > **Manage Administrator Profile Values task**.
2. In the search region of the Manage Administrator Profile Values page, enter the profile option code name `ORA_ZCA_SENS_ODA_CHANNEL_ID` in the Profile Option Code field.

3. Click **Search**.
4. Click the profile option name in the search results.
5. Paste the **Channel ID** into the Profile Value field.
6. Click **Save and Close**.