(22B) Oracle CX Sales: Sales Implementation

Oracle CX Sales and B2B Service

DURATION	MODULES	COURSE CODE
2 Days	**16 Lectures**	**—**

Course Overview

This Oracle CX SalesImplementation course covers mandatory tasks that must be performed once the system has been installed and provisioned for your use and once core setup has been completed. In this hands-on course, you'll learn the common tasks to set up your initial sales implementation. When possible, it identifies common mistakes so that you are positioned for future success.

What You Will Learn

Course Introduction

- Learning Objectives
- Course Audience
- Course Prerequisites
- Course Goal
- Course Objectives
- Course Methodology
- Course Materials
- Course Agenda
- Resources

Sales Users

- Learning Objectives
- What's It All About?
- Sales Resources: What's Different?
- Resource Organizations
- The Resource Abstract Role
- Preliminary Administrative Stuff
- 1. Set the Unique Email Profile Option
- 2. Configure Password Notification
- 3. Plan Your Implementation

- Create the Resource Hierarchy
- 1. If Necessary, Create Resource Roles
- 2. If Necessary, Create Provisioning Rules
- 3. Create the Top-Level Sales Resource
- 4. Provision Roles
- 5. Verify the Results
- 6. Import the Remaining Users
- The Sales User Quick Import Macro
- Lesson Highlights
- Practices

Accounts and Contacts

- Learning Objectives
- What's It All About?
- What You Should Know About Accounts
- Account Hierarchy
- Account Example
- What You Should Know About Contacts
- Contact Example
- How Do Accounts and Contacts Work?
- One More Idea: The Trading Community Model
- Why Should You Care About TCM?
- What Do You Need To Do?
- Configure the UI
- Configure the UI Example
- Configure Account and Contact Settings
- Example 1: Add an Independent Contractor Type
- Example 2: Set the Default Account Type to Prospect
- Import Accounts and Contacts
- Purge Inactive Sales Accounts and Contacts
- Delete Child Records for Inactive or Merged Parent Records
- Lesson Highlights

Leads

- Learning Objectives
- What's It All About?
- Lead Features
- Processing Leads
- Lead Lifecycle
- 1. Add Leads to the System
- 2. Assign Leads
- 3. Evaluate and Qualify Leads
- 4. Convert Leads to Opportunities
- What Do You Need To Do?
- Set Lead Profile Options

- Import Leads
- Create Lead Rules
- UI Configuration Example: Redirect to Opportunity
- UI Configuration Example: Predictive Lead Scoring
- Lesson Highlights
- Practices

Opportunities

- Learning Objectives
- What's It All About?
- Opportunity Features
- Opportunity Lifecycle
- What Do You Need To Do? Sales Methods and Sales Stages
- Sales Methods
- Sales Stages
- The Sales Stage Header
- Process Steps
- Manage Process Steps
- Additional Required Fields
- Recommended Documents
- Activity Templates
- Manage Activity Templates
- Assessment Templates
- OK, Got It! What Else Is There To Know?
- The Opportunity Quick Setup Page
- The Manage Opportunity Profile Options Task
- Recommended Actions
- Configure Recommended Actions
- Lesson Highlights
- Practices

Assessment and Activity Templates

- Learning Objectives
- What's It All About?
- Assessment Features
- Example: Qualify a Lead
- Example: Evaluate an Opportunity
- Saved Assessments
- What Do You Need To Do?
- Ratings
- Questions
- Question Weight
- Responses
- Response Score and Rating
- Assessment Score

- Final Score Ranges and Feedback
- Got It! What are the Steps?
- 1. Create an Assessment Template
- 2. Deploy the Template
- 3. Test the Template
- Another Kind of Template: Activity Templates
- Create an Activity Template
- Lesson Highlights
- Practice

Assignment and Access

- Learning Objectives
- What's It All About?
- First, Understand the Default Behavior
- Second, Don't Create Roles If You Don't Have To
- What's Available
- Advantages and Disadvantages
- Access Groups
- Access Groups Example
- Territories
- Assignment Rules
- What's Next?
- Lesson Highlights

Territory Overview

- Learning Objectives
- What's It All About?
- Review: Three Available Methods
- Why Not Use Access Groups For Everything?
- Things You Should Know About Territories
- Dimensions
- Ownership and Membership
- Inclusion and Exclusion
- Territory Types
- The Hierarchy
- How Do Territories Work?
- Territory Assignment
- Resource-Based Territories
- Create Resource-Based Territories
- OK, Got It! What's Next?
- Lesson Highlights
- Practice

Classification Categories

- Learning Objectives
- What's It All About?
- Working Example
- Classification Category Features
- Classification Groups
- Add an Auxiliary Dimension
- 1. Create a Classification Category and Set its Options
- 2. Add Hierarchy Nodes
- 3. Add the Category to a Group
- 4. Add the Category as an Auxiliary Dimension
- 5. Expose the Category in the User Interface
- 6. Use the Auxiliary Dimension in your Territories
- Got it! What Else Is There?
- Organization Type
- Account Industry
- Support an Indexed Lookup
- Lesson Highlights
- Practices

Addresses

- Learning Objectives
- What's It All About?
- The Address Dimension
- How Does The Address Dimension Work?
- How Do You Do It?
- The Exception: Postal Codes
- Matching Postal Codes
- Postal Code Rule Restrictions
- Postal Code Rule Examples
- Advantages of Using Postal Codes in the Address Dimension
- OK! How Do You Set It Up?
- 1. If Necessary, Enable the Address Dimension
- 2. Configure Addresses for Every Territory
- Important Considerations
- Recommended Practices
- Lesson Highlights
- Practice

Automatic Exclusions

- Learning Objectives
- What's It All About?
- Things You Need To Understand
- Territory Coverage

- Customer Inclusions and Exclusions
- Territory Function
- Territory Precedence
- Enable Territory Precedence
- Example Without Territory Precedence
- Example With Territory Precedence
- Example Using Territory Functions Without Territory Precedence
- Example Using Territory Functions With Territory Precedence
- Lesson Highlights
- Practice

Territory Assignment

- Learning Objectives
- What's It All About?
- The Big Idea
- Why Do You Care?
- Assignment Mapping Components
- Assignment Objects
- Assignment Mapping Types
- How Assignment Mapping Types are Processed
- Mapping Sets
- Duties Associated with Mapping Sets
- Enable an Auxiliary Dimension Mapping
- Disable a Dimension Mapping
- Lesson Highlights
- Practice

Build the Territory Hierarchy

- Learning Objectives
- What's It All About?
- Four Phases
- Phase 1: Preliminary Setup
- 1. Plan the Hierarchy
- 2. Perform Any Prerequisite Work Based On Your Plan
- Phase 2: Create the Territory Hierarchy
- 1. Create a Territory Proposal
- 2. Create a Root Territory
- 3. Add Child Territories
- 4. Activate the Territory Proposal
- Phase 3: Manage Territory Assignment
- Territory Assignment for Individual Records
- Automatic Territory Assignment
- Batch Territory Assignment
- Configure Additional Territory Options
- Active Territory Updates

- Manage Territories In Workspace or Work Area Powered by Adaptive Search
- Resolve Gaps and Overlaps with Workspace
- View Gaps and Overlaps by Account
- Identify Gaps and Overlaps with Analytics
- When Do I Need to Update Territories?
- What Else Do I Need To Do?
- Lesson Highlights
- Practices

Rule-Based Assignment

- Learning Objectives
- What's It All About?
- Lots of Different Uses
- Lead Scoring
- Lead Classification
- Resource Assignment
- Territory Filtering
- Organization of Rules
- Rule
- Rule Set
- Rule Category
- When Do Rules Get Processed?
- Batch Assignment
- Implement Rule-Based Assignment
- 1. Design the Rule
- 2. Edit Profile Options to Enable Rule-Based Assignment for the Object
- 3. (Optional) Create Rule Categories for the Desired Assignment Modes
- 4. Create each Rule Set and Associate it with its Rule Category
- 5. Set Rule Set Filtering Options
- 6. Add Rules to each Rule Set
- 7. Schedule Rule-Based Assignment
- 8. Test the Rules
- Lesson Highlights
- Practices

Forecasting

- Learning Objectives
- What's It All About?
- Why Use Forecasting?
- Forecasting Features
- How Do Forecasts Work?
- Why "Parent Territory Owner" Instead of "Manager"?
- How Opportunities Are Included in a Forecast
- What Does A Sales Representative See/Do?
- What Does A Parent Territory Owner See/Do?

- Key Concepts: What You Need To Know
- Forecast Period
- Territory Freeze Date
- First Forecast Due Date
- Submission Window
- Concurrent Forecasts
- Unadjusted Forecast Criteria
- Forecast Criteria Override
- Forecast Criteria Override: Recommended Practice
- Overlay Forecasts
- What Do You Need To Do?
- 1. Verify the Prerequisites
- 2. (Optional) Enable Resource Forecasting
- 3. Set Forecasting Options
- 4. Schedule Forecast Processes
- Considerations
- Lesson Highlights

Quota Management

- Learning Objectives
- What's It All About?
- Sales Quota Features
- How Do Quotas Work?
- Sales Goal
- Sales Goal Quota
- Overview Of What You Need To Do
- Working From The Top Down
- Define a Sales Quota Plan
- 1. Verify the Prerequisites
- 2. Determine the Total Quota for the Organization
- 3. Create the Sales Quota Plan
- 4. Set Sales Quota Plan Options
- Territory Quota Formulas
- Seasonality Factor Groups
- 5. Activate the Sales Quota Plan
- Manage Quotas
- Distribute Quotas and Goals
- Distribute Quotas
- Variance
- Additional Sales Goals
- Create Sales Goals
- Perform Seasonal Adjustments
- What Else Do You Need To Do?
- Set Quota Profile Options
- Schedule Periodic Quota Jobs
- Resources

- Lesson Highlights
- Practice