(22B) Oracle CX Sales and Oracle B2B Service: Implementation Foundation

Oracle CX Sales and B2B Service

DURATION	MODULES	COURSE CODE
3.5 Days	**39 Lectures**	**—**

Course Overview

The Oracle Sales and Service: Implementation Foundationcourse teaches you the key skills you need to get started on the right path to a successful implementation. You will gain a solid technical foundation of core knowledge that is necessary before you take on more advanced or specialized tasks.

What You Will Learn

Course Introduction

- Learning Objectives
- Course Audience
- Course Prerequisites
- Course Goal
- Course Objectives
- Course Methodology
- Course Materials
- Course Agenda
- Resources: Documentation
- Resources: My Oracle Support
- Resources: Other Resources

Implementation Overview

- Objectives
- What Types of Cloud Solutions Does Oracle Provide?
- What is an Oracle Cloud-Based Application?
- Characteristics of Cloud-Based Applications
- Environments
- Implementing Your Business Processes

- Use Provided Functionality
- What is Your Implementation Approach?
- Comparing Approaches
- Where Possible, Configure, Don't Extend
- Be Prepared for Updates
- Plan Your Environment Carefully
- Cloud-Based Application Considerations
- Post-Implementation Steps
- Lesson Highlights

Tools Overview

- Objectives
- What's It All About?
- Setup and Maintenance
- Profile Options
- Security Console
- Scheduled Processes
- Oracle Business Intelligence (BI)
- Configuration Tools
- Application Composer
- Page Composer
- Visual Builder
- Learning Resources
- Lesson Highlights

Navigation and Themes

- Learning Objectives
- What's It All About?
- Lots of Ideas
- How Do You First Sign In?
- Where Do You Land?
- What Can You Do?
- How Do You Use the Navigator?
- What are Favorites?
- What Are Notifications?
- The Worklist
- What's the Settings and Actions List?
- What's on the Rest of the Home Page?
- Infolets
- What's the Rest of the Story?
- Landing Pages
- Creation Pages
- Details Pages
- Other Themes
- What Else Does The Theme Control?

- Lesson Highlights

Structure and Personalization

- Learning Objectives
- What's It All About?
- The Structure Page
- Example: Hide Price Books from the Navigator
- What Else Can You Do On the Structure Page?
- What Can You Do As A User?
- Other Personalization
- Reset a User's Personalization
- Lesson Highlights

Workspace

- Learning Objectives
- What's It All About?
- Navigate the Workspace
- Dynamic Tabs
- Smart Lists
- Work with Records
- Workspace Search
- Add or Remove Filters
- Group By
- Other Configurations
- Work Area Powered By Adaptive Search
- Lesson Highlights

Setup Assistant

- Learning Objectives
- What's It All About?
- How Do You Do It?
- Fill Out the Spreadsheet
- Generate an Import File
- Can I Run the Setup Assistant Multiple Times?
- Lesson Highlights

Offerings

- Learning Objectives
- What's It All About?
- How Do You Do It? Step 1: Enable the Offering
- How Do You Do It? Step 2: Choose the Features
- How Do You Do It? Step 3: Run a Task
- Other Things You Need To Know Before The Demo
- All Tasks

- Searching for Tasks
- Searching for Tasks: Search Within An Offering
- Searching for Tasks: Global Search
- Change Feature Opt In
- New Features
- Lesson Highlights
- Practice

Implementation Projects

- Learning Objectives
- What's It All About?
- How Do You Do It?
- What Do Implementation Projects Do That Offerings Don't?
- OK, How Do You Run A Task?
- Are There Any "Gotchas"?
- Lesson Highlights

Initial Configurations

- Learning Objectives
- What's It All About?
- Set or Review the Company Profile
- The Accounting Calendar
- Add Calendar Years
- Currencies
- Exchange Rates
- A Geography
- Geography Type
- Geography Structure
- Import Geographies
- Manage Geographies
- Geography Validation
- Addresses
- Address Format
- Geocoding
- Lesson Highlights

Security Overview

- Learning Objectives
- What's It All About?
- Authentication
- Authorization
- Visibility
- Summary
- OK, Got That! What's Next?

- The Role Hierarchy
- Policy Types
- OK, Let's Move On Up
- Last, But Not Least
- Other Names You'll See
- One More Time
- Additional Mechanisms
- Lesson Highlights

Setup Users

- Learning Objectives
- What's It All About?
- So What's A Setup User?
- How Do You Do It?
- Resource Roles
- Role Provisioning Rules
- What Should You Put In Your Role Provisioning Rule?
- Autoprovisioning
- Creating Setup Users: Summary
- Lesson Highlights
- Practice

Security Console: User Categories

- Learning Objectives
- What's It All About?
- A Different Approach
- Oracle Security Console: Your One-Stop Shop
- What's A User Category?
- How Do You Create a User Category?
- Once You've Created It, What Can You Do?
- Set Password Policies
- Configure Notifications
- Configure Notifications: Example
- Add Users to a User Category
- Lesson Highlights

Security Console: Roles

- Learning Objectives
- What's It All About?
- How Do I Do It?
- Administrative Options
- Review: Security Roles
- The Most Important Idea Of All
- Typical Security Administration Flow

- Security Administration Flow
- Examine an Existing Role
- A Graphical View
- Simulate Navigator
- View Roles that Grant Access
- Create New Roles
- Copy Existing Roles
- Compare Two Roles
- Examine an Existing Role: Users Associated with the Role
- Security Analytics
- Security Considerations
- Lesson Highlights
- Practice

Sales and Service Access Management

- Learning Objectives
- What's It All About?
- Sales and Service Access Management
- How Do You Do It?
- Modify Access
- Advanced Policies
- When Should I Use Which Tool?
- One More Thing: Access Explorer
- Lesson Highlights
- Practice

Access Groups

- Learning Objectives
- What's It All About?
- Things to Know
- Access Group Rules
- How Do You Do It? Step 1: Get Users in the Group
- How Do You Do It? Step 2: Grant Access
- System Access Groups
- Predefined Object Sharing Rules
- Example: Using System Access Groups and Predefined Object
- Sharing Rules
- Working Example: VP Access to High-Revenue Opportunities
- Create Your Own Access Group
- Manually Add Group Members
- Use Rules to Add Members
- Grant the Access Group Access to an Object
- What if the Field (Attribute) I Want Isn't There?
- Test the Results
- What About Related Objects?

- When Should I Use Which Method?
- Considerations
- Lesson Highlights
- Practice

Security Console: Other Features

- Learning Objectives
- Users: What's It All About?
- What Have You Already Seen?
- What Can You Do In The Security Console For Sales And Service?
- Manage User Passwords
- Edit User Information
- Edit User Roles
- What About the Other Tabs?
- Analytics
- Single Sign-On
- API Authentication
- Administration
- Lesson Highlights

Profile Options

- Learning Objectives
- What's It All About?
- Profile Options
- Profile Option Values
- How Do You Do It?
- Profile Options: Name and Code
- Search for Profile Values
- Profile Option Levels
- A Shortcut: Quick Setup Pages
- Lesson Highlights

Lookups

- Learning Objectives
- What's It All About?
- What Does the End User See?
- What Can You Do As An Administrator?
- How Do You Do It?
- Lookup Type
- Lookup Values
- What Else You Need to Know: Configuration Levels
- How Do You Find The Lookup You Want To Modify?
- The "Manage Standard Lookups" Task
- Specific Lookup Tasks

- User Interface
- How Do You Edit The Lookup?
- Once You're Done, Don't Forget to Verify the Lookup
- Lesson Highlights

Scheduled Processes

- Learning Objectives
- What's It All About?
- How Do You Do It?
- Where Is It Used?
- Got It! What Are The Steps?
- Useful Information Before You Go To The Demo
- One More Thing: Cancelling A Scheduled Process
- Lesson Highlights
- Practice

Routines

- Learning Objectives
- What's It All About?
- What Do You Need To Know?
- What Do You Need To Do?
- 1. Provide Basic Details
- 2. Specify an Object and Actions
- 3. Specify Rules
- 4. Specify Scheduling
- 5. Test the Results
- Lesson Highlights

Layouts

- Learning Objectives
- What's It All About?
- Things You Need to Know First, #1: Sandboxes
- Things You Need to Know First #2: Layout Types
- Things You Need to Know First #3: Not Everybody Sees the Same Layout
- How Do You Do It?
- Where is it Used?
- Got it! What are the steps?
- Useful Information Before You Go to the Demo
- Lesson Highlights
- Practice

Extensibility

- Learning Objectives
- What's It All About?

- What You Can Do: Modify Objects and Fields
- What You Can Do: Add Business Logic To An Object
- What You Can Do: Add Actions Or Links To An Object
- Summary for Objects
- What Else You Can Do: Create Workflows
- Without Protection, Things Could Go Wrong
- The Solution: Sandboxes
- How Do You Use A Sandbox?
- What Do You Do When You're Done?
- Lesson Highlights

Import and Export

- Learning Objectives
- What's It All About?
- What's Available?
- 1. Quick Import Macros
- 2. Import Management
- 3. Web Services
- More About Web Services
- RESTful Web Services
- Using RESTful Web Services for Imports
- Wait a Minute! What About Exports?
- What Else Do You Need To Know?
- Lesson Highlights
- Practice

Migration

- Learning Objectives
- What's It All About?
- Is This Your First Move?
- Recommendations for Easier Migration
- Initial Migration
- What Do You Migrate?
- Initial Migration Tools
- Tool #1: The Setup Assistant
- What Does the Setup Assistant Do For You?
- Tool #2: Setup Data Migration
- What Does Setup Data Migration Do For You?
- Tool #3: Configuration Set Migration
- What Does Configuration Set Migration Do For You?
- Restoring Modifications
- Tool #4: Import and Export Management
- Things to Check
- Considerations and Recommended Practices for Initial Migration
- Incremental Migration

- Before You Start an Incremental Migration
- How Is Incremental Migration Different?
- Setup Data Migration for Incremental Migrations
- Configuration Set Migration for Incremental Migrations
- Considerations and Recommended Practices for Incremental Migrations
- Lesson Highlights

Integration with External Systems

- Learning Objectives
- Integration Options
- Prebuilt
- Example #1: Microsoft 365
- How Do You Do It?
- What Else Can You Do?
- Example #2: Oracle Intelligent Advisor (OIA)
- OIA – CX Sales Integration
- How Do You Do It?
- Infrastructure Services
- Oracle Integration Cloud
- Partner Solutions
- Web Services
- Lesson Highlights

Activities

- Learning Objectives
- What's It All About?
- Activities
- What Does the End User See?
- What Do You Need To Do?
- Lesson Highlights

Catalogs

- Learning Objectives
- What's It All About?
- How Do You Do It?
- Where Is It Used?
- Got It! What are the Steps?
- Wait! What About Products?
- Create Products
- Add Products to a Catalog
- Product Security
- Useful Information Before You Go to the Demo
- Lesson Highlights

Multiple Business Units

- Learning Objectives
- What's It All About?
- How Do You Do It?
- Where Is It Used?
- What More Do I Need To Know?
- Business Units and Organizational Hierarchies
- How Is It Implemented? Idea #1: SETID
- How Is It Implemented? Idea #2: The Business Unit Field
- Got It! What Are The Steps?
- Lesson Highlights
- Practice

Notifications

- Learning Objectives
- What's It All About?
- Notifications
- Enable Notification Channels
- Notification Types
- Security Notifications
- Configure Security Notifications
- Security Notification Examples
- Activity Notifications
- Configure Activity Notifications
- Personalize Activity Notifications
- Activity Notification Examples
- Approval Notifications
- Configure Approval Notifications
- Approval Notification Example
- Additional Approvals
- User-Defined Notifications
- Groovy
- Create a Groovy Notification Script
- Notification Script Example
- Lesson Highlights

Analytics: Overview

- Learning Objectives
- What's It All About?
- How Do You Do It?
- Where Is It Used?
- Example: Adoption and Usage Tracking
- Example: Application Usage Insights
- What Else Do You Need To Know?

- Where Can You Get More Information?
- Lesson Highlights
- Practice

Infolets

- Learning Objectives
- What's It All About?
- Analytics Infolets (also called just "Infolets")
- Page Composer
- End Users and Infolets
- Actionable Infolets
- Configure Actionable Infolets
- End User Configuration
- Administrator Configuration
- Workspace Infolets
- Enable Workspace Infolets
- Create Your Own Workspace Infolets
- Which Should I Use?
- Lesson Highlights

Mobile: Overview

- Learning Objectives
- What's It All About?
- What Does It Do?
- Work with Records
- Analytics
- Enhanced Functionality
- What Else?
- How Do You Do It?
- Mobile Profile Options
- Mobile Configuration
- Features of CX Sales Mobile Composer
- CX Sales Mobile Composer Interface
- Edit the Home Page
- Edit Card Views
- Edit an Object's Pages
- Manage Overall Settings
- Write Scripts
- Lesson Highlights

Search Overview

- Learning Objectives
- What's It All About?
- Search Comparison

- When Should You Use Which Search
- The User Experience: Work Area Search
- Work Area Search: Basic Searches
- Work Area Search: Suggested Items
- Work Area Search: Advanced Searches
- Work Area Search: Saved Searches
- Work Area Searches: Export Search Results
- The User Experience: Global Search
- Basic Searches
- Suggested Items
- Advanced Searches
- Filters
- The User Experience: Workspace Search
- Workspace Search: Basic Searches
- Workspace Search: Recent Items
- Workspace Search: Filters
- Workspace Search: Saved Searches
- Workspace Search: Export Search Results
- Why Use Workspace Search?
- Feature Comparison
- Lesson Highlights

Configure Work Area Search

- Learning Objectives
- What's It All About?
- Review: The End User Experience
- As An Administrator, What Do You Have To Do?
- Schedule the Indexing Jobs for Work Area Search
- Set Profile Options for Work Area Search
- Hide Record Set Filters
- Create Administrative Saved Searches
- Lesson Highlights

Workspace and Adaptive Search

- Learning Objectives
- What's It All About?
- Review: The End User Experience in Workspace
- As An Administrator, What Do You Have To Do?
- Enable Objects to be Searched
- Enable Work Area Powered by Adaptive Search
- Configure Objects to be Searched
- Monitor Search Processes
- Set Parameters
- Modify UI Behavior
- Configure Grouping

- Configure Mass Update
- Compare Configurations
- Lesson Highlights

Administer Workspace

- Learning Objectives
- What's It All About?
- Create Saved Searches
- Manage Saved Searches
- Enable Dynamic Tabs
- Configure Smart Lists
- Lesson Highlights

Global Search

- Learning Objectives
- What's It All About?
- Review: The End User Experience
- As An Administrator, What Do You Have To Do?
- Enable Global Search
- Enable Objects to be Searched
- (Optional) Modify the Global Search User Interface
- (Optional) Duplicate the Default Global Search Configuration
- (Optional) Modify the Global Search Configuration
- Other Considerations
- Lesson Highlights

Configure Auditing

- Learning Objectives
- What's It All About?
- What Do You Need To Know?
- What Do You Need To Do?
- 1. Enable Auditing for the Application
- 2. Enable Auditing for an Object
- 3. Select the Fields for that Object
- 4. Test the Results
- Lesson Highlights