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Oracle Sales Cloud

Implementation Partner Workshop

Wrap Up

June, 2016

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Safe Harbor Statement

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.

Agenda

1. Things to note
2. Training Week Summary
3. Next Steps

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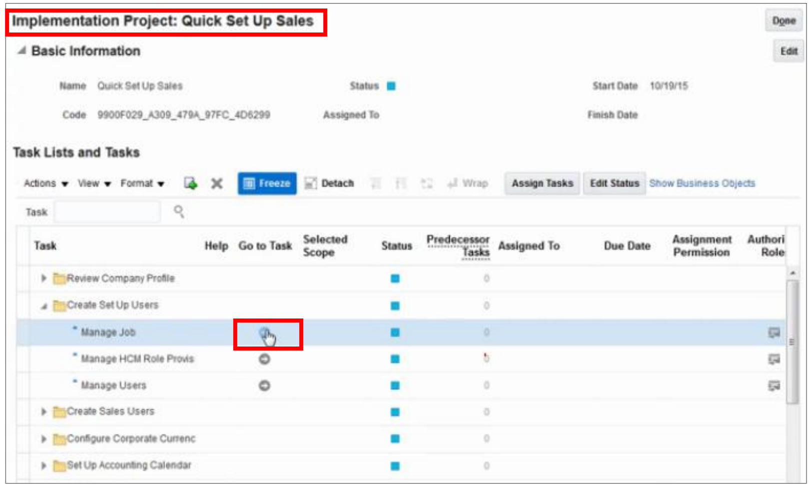
Super Charge Your Sales Cloud Deployment

Quick Setup Sales Implementation Project template + Getting Started Guide = **Recipe for Success**

- No more guess work – tasks are in the correct sequence
- No more querying tasks - just click **Go to Task**
- No need to use the navigator to access Scheduled Processes & Work Areas used for setup – directly available in the IP
- Quick Setup Sales Implementation Project – The new home of the OSC Deployment team!!



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Important

Transition to Simplified UI

Align with the Product Trajectory

- Develop a Plan to switch to Simplified Pages
- Adopt Simplified Pages
- Phase out old Desktop/Classic pages

Highly recommend to switch to Simplified Pages before your upgrade to Release 11

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Important

Develop a Plan to switch to Simplified Pages

Resources to help you

- Oracle Sales Cloud: Simplified User FAQ (MOS ID: 166336.1)
  - Watch the overview video that explains what, why, when, and how to transition to the simplified pages
  - Review the checklist that guides you through the step sequence for making the transition

Contact your Oracle Customer Success Manager or Implementation Success Manager if there is a functional reason why you cannot switch to simplified pages. We are here to help you!

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Important

Adopt Simplified Pages

Suggested Path

- **Review** the standard functionality available with Simplified Pages
  - Some Simplified Pages functionality is enhanced and not available on Desktop Pages
- **Review** the customizations you made to Desktop Pages
  - Do you still need to support your business flows with Simplified Pages?
- **Replicate** any necessary customizations on the Simplified Pages in your non-production environment
- **Add** your custom reports to Sales Infolet Page within Simplified Pages (if required)
- **Communicate** with your users about the transition to Simplified Pages
- **Copy** your changes to your production environment
- **Set** the FND_CLASSIC_INTERFACE profile option to "N"

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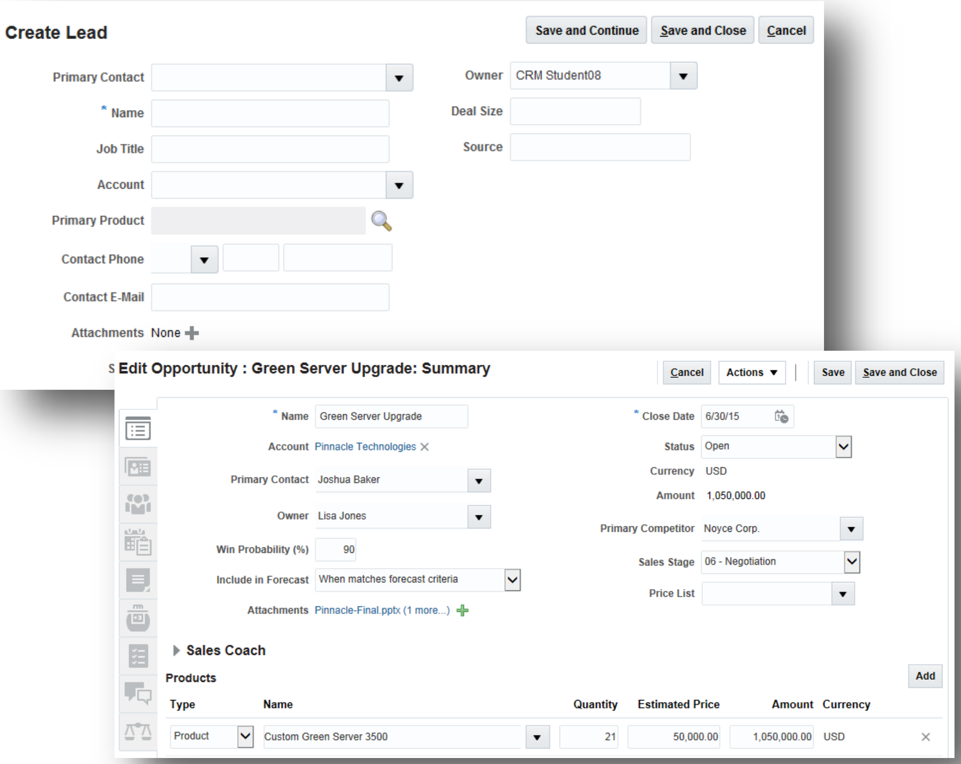
Important

Phase Out the Duplicate Desktop Pages

Start using the corresponding Simplified Pages

- Account, Contact and Household Pages
- Activity Pages
- Opportunity, Lead and Forecasting Pages
- Partner Management Pages
- Sales Campaign Pages



Transition to Simplified UI

Don’t lag behind…

- Switch to Simplified Pages before your upgrade to Release 11
- Use the first months after the upgrade to finish any work you could not complete before the upgrade
- Ensure everyone uses Simplified Pages; duplicate desktop pages will be sunset when you upgrade to Release 12

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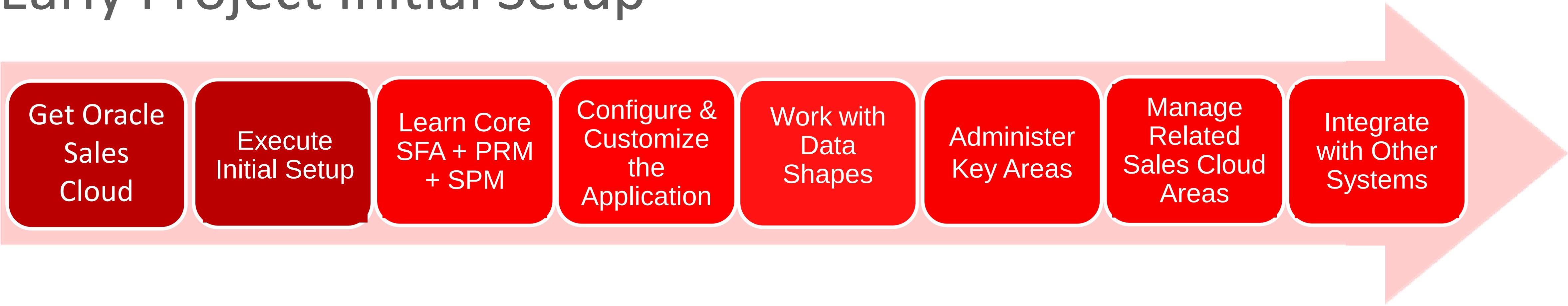
Training Week Summary

- Get Oracle Sales Cloud
- Execute Initial Setup
- Learn Core SFA + PRM + SPM
- Configure & Customize the Application
- Work with Data Shapes
- Administer Key Areas
- Manage Related Sales Cloud Areas
- Integrate with Other Systems

Early Project Initial Setup



- Provisioning and Initial Set-up of Sales Cloud
- Implementation Process and Tools
- User Set-up and Security

Early Project Initial Setup

Provisioning and Initial Set-up of Sales Cloud

Get Oracle Sales Cloud → Execute Initial Setup → Learn Core SFA + PRM + SPM → Configure & Customize the Application → Work with Data Shapes → Administer Key Areas → Manage Related Sales Cloud Areas → Integrate with Other Systems

What you LEARNED:

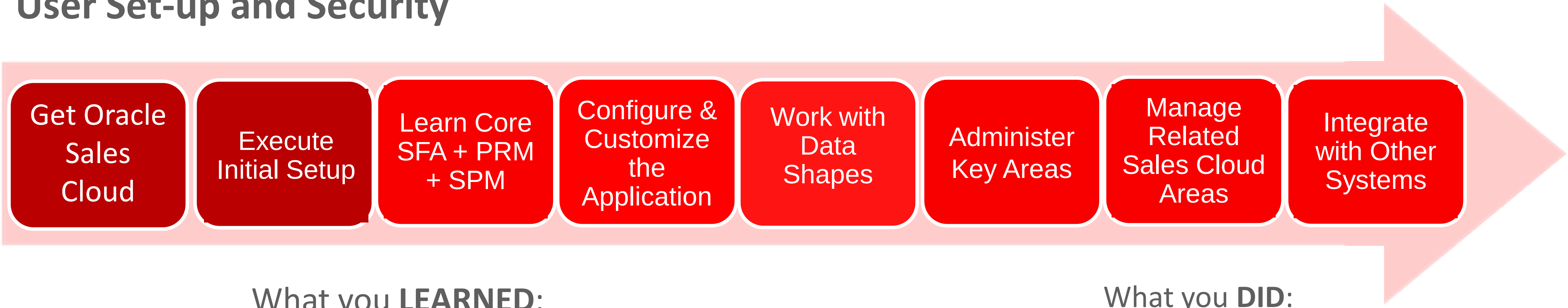
- How to get Sales Cloud
- Where to Administer Instances
- Sales Cloud upgrade and patch schedule
- How to set up the initial pieces of Sales Cloud
- How to use Implementation Project and Tools
- How Unified Navigation streamlines navigation within OSC

What you DID:

- Set up a new geography
- Enabled validation for a geography
- Reviewed initial data set up by Oracle
- Setting up a Resource Organization
- Created an Implementation Project

Early Project Initial Setup

User Set-up and Security



What you **LEARNED**:

- The concepts and components of Role Based Access Control
- What data sharing modes exist in Sales Cloud
- The different RBAC Management Tools (including the Security Console)
- Upgrade Considerations (Reference Role Model)

What you **DID**:

- Created a new sales user
- First reviewed and then created provisioning rules and applied them to a new user
- Explored Enterprise Roles, Duty Roles and Policies
- Revisited Enterprise Roles, Duty Roles and Policies using Security Console
- Created a custom role that restricted access to Opportunities
- Configured custom object security and controlled visibility

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Core SFA + PRM + SPM

Get Oracle Sales Cloud | Execute Initial Setup | Learn Core SFA + PRM + SPM | Configure & Customize the Application | Work with Data Shapes | Administer Key Areas | Manage Related Sales Cloud Areas | Integrate with Other Systems

- Activities
- Accounts/Contacts/Households
- Sales Campaigns
- Leads
- Opportunities
- Partner Relationship Management (PRM)
- Sales Performance Management (SPM)
- Territory Management Deep Dive

Core SFA + PRM+ SPM

Activities

Get Oracle Sales Cloud → Execute Initial Setup → Learn Core SFA + PRM + SPM → Configure & Customize the Application → Work with Data Shapes → Administer Key Areas → Manage Related Sales Cloud Areas → Integrate with Other Systems

What you **LEARNED**:

- The unified Activity Object Model
- How to access activities Pages – List, Summary and Creation pages
- How to use the Manage My Calendar side tab for team and deal calendars
- How to manage activities “On the Go” via the Call Report Mobile Application
- Activities reporting
- Extending activity objects

What you **DID**:

- Created/Managed Activities
- Created a Call Report
- Configured the display color of an Activity Type
- Created a new team calendar, configured the team calendar and added resources to the team calendar
- Explored deal calendars

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Core SFA + PRM + SPM

Account, Contact And Household Management

Get Oracle Sales Cloud → Execute Initial Setup → **Learn Core SFA + PRM + SPM** → Configure & Customize the Application → Work with Data Shapes → Administer Key Areas → Manage Related Sales Cloud Areas → Integrate with Other Systems

What you **LEARNED**:

- Account/Contact/Household List Management features/functions
- Account/Contact/Household Overview Page fields
- Subtabs that expand the Account/Contact/Household detail views
- How to utilize “White Space Analysis” to get insight into the top accounts by revenue potential
- Extending the Account, Contact and Household objects
- Simplified SOAP Web Services and New Restful web services for Accounts, Contacts and Households

What you **DID**:

- Converted a Prospect to a Customer
- Exposed additional fields for contacts (i.e. DOB field)
- Created and explored how household members interact with contacts, accounts, leads, and opportunities
- Explored the configurations necessary to enable Households in your deployment
- Added additional relationship choices to the drop down lists in Household relationships

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Core SFA + PRM+ SPM

Sales Campaigns

Get Oracle Sales Cloud
Execute Initial Setup
Learn Core SFA + PRM + SPM
Configure & Customize the Application
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What you **LEARNED**:

- Overview of Sales Campaigns
- Business Process
- How to create a sales campaign
- How to monitor and convert responses
- How to setup Marketing templates
- Available Campaign Reports

What you **DID**:

- NA

Core SFA + PRM+ SPM

Leads and Opportunities

Get Oracle Sales Cloud → Execute Initial Setup → **Learn Core SFA + PRM + SPM** → Configure & Customize the Application → Work with Data Shapes → Administer Key Areas → Manage Related Sales Cloud Areas → Integrate with Other Systems

What you **LEARNED**:

- Lead and Opportunity Definition
- How to process leads, from creation to conversion
- How to implement and manage Opportunities
- Lead and Opportunity assignments
- How multiple business units are used in Lead and Opportunity
- Available reports for Lead and Opportunity

What you **DID**:

- Created and processed a prospect lead through available options and converted it to an opportunity
- Reviewed how to setup a default qualification template
- Reviewed and verified the Lead Ranking and Scoring Rules available in the training environment
- Customized the default mapping of attributes between Lead and Opportunity
- Created a new rule set for rule-based assignment of leads to assign additional resources to a lead (After Class)
- Explored an Opportunity
- Reviewed some of the profile options for opportunities(After Class)

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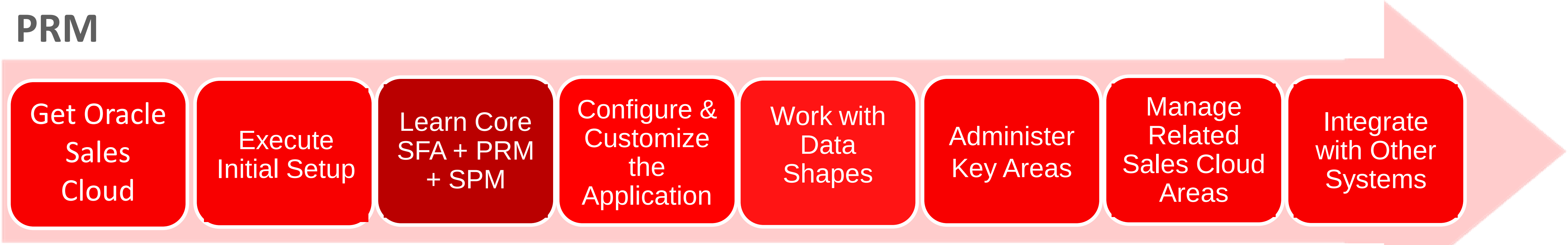
Core SFA + PRM +SPM

PRM



What you **LEARNED**:

- The new functionality for developing Business Plans and Objectives
- The detailed end to end Marketing Development Funds process from budget to settlement
- How to set up Partner Programs and enroll partners
- How CAM's engage in Partner, Lead and Opportunity Management via the Simplified Pages
- How Partners can manage Activities, Leads and Opportunities via the Partner Portal
- Extending and Configuring the Deal Registration process
- Prebuilt reports for deal registration and new Subject Areas for Partner Reporting
- Partner Relationship Management Setup Tasks

What you **DID (After Class)**:

- Created a Channel Account Manager, a Partner and a Partner Contact via interface, Web Services and Import
- Created a Business Plan and objectives including splits
- Created a Partner Program with Tiers and Benefits, and enrolled partners in the Program
- Followed the end to end process to set up MDF Budgets, submit MDF Requests, MDF Claims and process MDF Settlements working as a PSR, CAM and COM
- Set up and modified a multi-step approval workflow
- Created Partner Impersonation
- Created custom layouts for Partner sales users
- Completed Deal Registration Workflow both as a PSR and CAM
- Imported Partner, Partner Contact, MDF (Budget, Plan & Claims), Programs and related enrollments, Program Objectives

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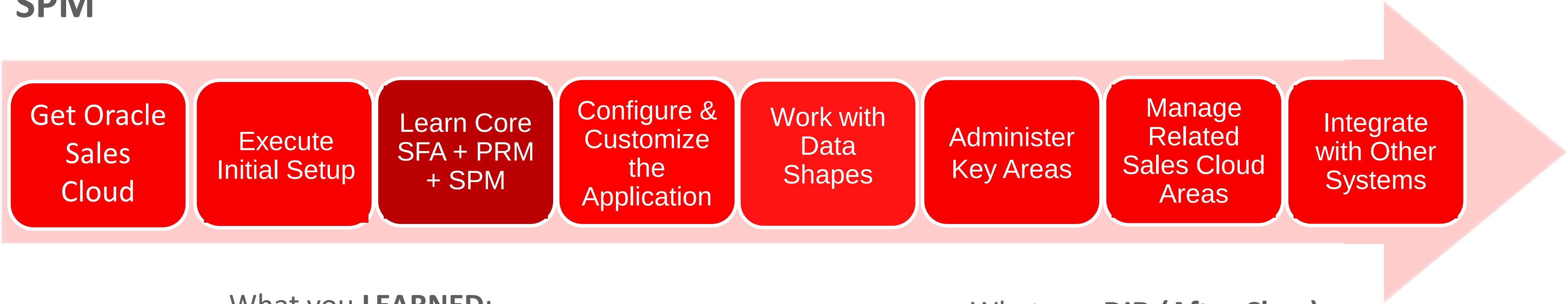
Core SFA + PRM +SPM

SPM



What you **LEARNED**:

- Sales Performance Challenges
- What Sales Performance Management means
- Oracle SPM Solutions
  - Sales Coaching and Productivity Tools
  - Incentive Compensation Management
  - Forecasting
  - Quota Management
  - Territory Management (next slide)
  - How Assignment works

What you **DID (After Class)**:

- As a Sales VP, analyzed/modified a New Quota Plan and assigned/refined the quotas of your individual Sales Representatives
- Explored Advanced capabilities during the allocation process
- Generated a Actual V/S Quota report comparing “Won Opportunities” v/s “Target Quota”
- Created a custom Quota Calculation formula

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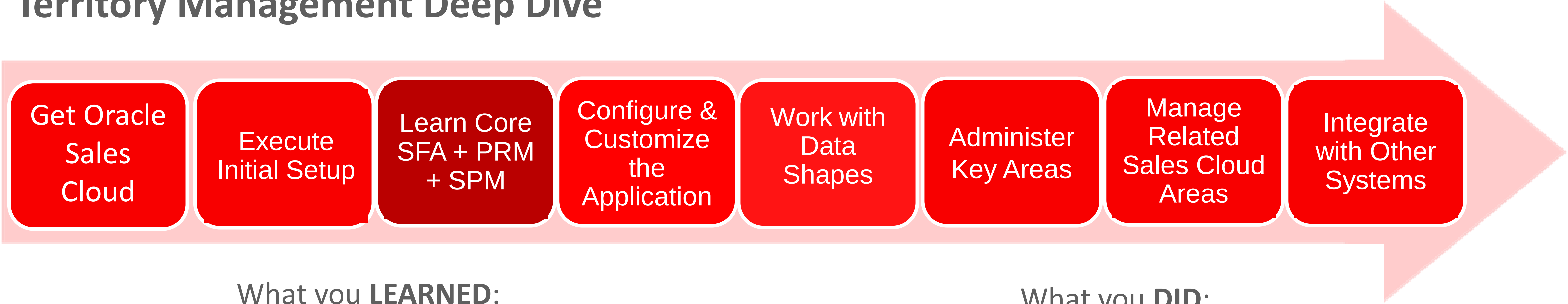
Core SFA + PRM + SPM

Territory Management Deep Dive



What you **LEARNED**:

- What Territory Management is and how it is used
- Territory Management Overview: The Big Picture
- Territory Management functionality in Simplified Pages
- Defining Coverage (including the new dimension Business Unit)
- Territory Assignment
- Territory Proposals
- Territory Visibility (Security)
- Territory Management Implementation Guidelines

What you **DID**:

- Tested territory assignment
- Learned how access and visibility are controlled with territories
- Created a new territory via simplified pages and also via territory proposal
- Exported a territory structure, modified in Excel and imported the new territory structure
- Modeled a Territory Hierarchy (After Class)

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Core SFA + PRM + SPM

Assignment

Get Oracle Sales Cloud → Execute Initial Setup → **Learn Core SFA + PRM + SPM** → Configure & Customize the Application → Work with Data Shapes → Administer Key Areas → Manage Related Sales Cloud Areas → Integrate with Other Systems

What you **LEARNED**:

- How Assignment Works
  - Territory Based Assignment
  - Rule Based Assignment
- Assignment using Multiple Industries or Classifications
- Custom Object Assignment
- Some Implementation Guidance and Setup Steps
- Hoe to use Assignment Diagnostics

What you **DID**:

- Tested territory assignment - You did this exercise in the TM module
- Created rules for rule-based assignment of leads (After Class) – You did this exercise in the Leads module

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Core SFA + PRM +SPM

Sales Forecasting

Get Oracle Sales Cloud → Execute Initial Setup → Learn Core SFA + PRM + SPM → Configure & Customize the Application → Work with Data Shapes → Administer Key Areas → Manage Related Sales Cloud Areas → Integrate with Other Systems

What you **LEARNED**:

- Available functionality for sales reps and sales managers
- Release 11 enhancements
- Forecast dependencies
- How opportunities gets included in a forecast
- Available options to assign forecast territory
- How to configure and set up Sales Forecasting
- How to tailor Sales Forecasting
- Available Sales Forecasting Reports
- Implementation Considerations

What you **DID (After Class)**:

- Explored forecasting flow and available functionality as a sales rep and a sales manager
- Reviewed forecasting settings in the training environment
- Examined the setting impact on opportunities

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Configuration and Customization

Sandboxes, Application Composer, Scripting, Page Composer, CSM

1. Get Oracle Sales Cloud
2. Execute Initial Setup
3. Learn Core SFA + PRM + SPM
4. Configure & Customize the Application
5. Work with Data Shapes
6. Administer Key Areas
7. Manage Related Sales Cloud Areas
8. Integrate with Other Systems

What you **LEARNED**:

- How to handle and test extensions and customizations before actually applying them
- What Customization and Configuration features are available
- How to make pages different for different groups of users
- When I need more complicated logic, what scripting support is available
- How to manipulate data using Restful Web Services
- How to migrate setup and customization data from one environment to an other

What you **DID**:

- Extended standard objects (i.e. Account and Opportunity)
- Created a Custom Object as a Top Level Card
- Created a Many-to-Many Relationship Between Objects
- Created Summary Boxes
- Created "Create" button to OOTB related objects in Sub Tabs
- Created a Product Item DFF, Accessed the DFF with a Web Service & Made the DFF Visible in the Opportunity Line Item section
- Worked with Restful Web Services
- (Single User) Created a Dynamic Layout (i.e. based on user roles, filter criteria, groovy script)
- Called an External Web Service from a Groovy Script
- (Single User) Created an Approval Process
- Experimented with Web Services (i.e. invoked a web service, used JWT, custom object web services)
- Tailored the Opportunity Pages for Sales Representatives
- Explored Exporting Customizations

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Data Shapes

File Import

Get Oracle Sales Cloud → Execute Initial Setup → Learn Core SFA + PRM + SPM → Configure & Customize the Application → Work with Data Shapes → Administer Key Areas → Manage Related Sales Cloud Areas → Integrate with Other Systems

What you **LEARNED**:

- Overview of File-based Data Import
- The process of importing data from start to finish
- Different file formats (Text, CSV, ZIP) supported during Import
- How Round-Trip support expedites the file import process
- Key Tips and Considerations with file import
- How to utilize web services to import file-based data
- Validation and debugging

What you **DID**:

- Import and Export Account Data
- Imported an Activity
- Imported an Activity with using a Zip file
- Imported an Activity with an Attachment
- Imported an Activity via a Web Service
- Imported an Asset Related to a Product Group
- Imported an Asset Associated with Product Items
- Imported Custom Object
- Leveraged the Round Trip capability to import an Opportunity
- Imported Product Items
- Imported a Resource from a CSV File
- Importing Country Structure
- Importing Geography Hierarchies
- Import a Customer Hierarchy
- Import Customer Hierarchy Members
- Import a Lead Associated with Product Group
- Importing Product (new object)
- Importing a Resource Hierarchy
- Importing Territory Geographies

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Administer Key Areas

Smartphones and Tablets

Get Oracle Sales Cloud → Execute Initial Setup → Learn Core SFA + PRM + SPM → Configure & Customize the Application → Work with Data Shapes → **Administer Key Areas** → Manage Related Sales Cloud Areas → Integrate with Other Systems

What you **LEARNED**:

- Key Capabilities of:
  - Oracle Sales Cloud Mobile
  - Call Report App
  - Deal Management App
  - Oracle Mobilytics
  - Oracle Voice
- Extensibility for OSC Mobile App
- How to test Mobile App Customizations in a sandbox

What you **DID**:

- Configured the Smartphone Application:
  - Configured springboard
  - Added a custom object
  - Included a dynamic choice list field of the custom object to the opportunity object
  - Configured Dynamic Layouts for sales reps
  - Added a report to the analytics pages, etc…
- Performed basic tasks on the OSC Mobile Application (After Class)
- Explored basic tasks of Oracle Voice (After Class)

Administer Key Areas

Outlook + IBM Notes

Get Oracle Sales Cloud → Execute Initial Setup → Learn Core SFA + PRM + SPM → Configure & Customize the Application → Work with Data Shapes → **Administer Key Areas** → Manage Related Sales Cloud Areas → Integrate with Other Systems

What you **LEARNED**:

- Overview and key capabilities of:
  - OSC for Outlook
  - OSC for IBM Notes
- Data Synchronization
- Data volume considerations
- Deployment and upgrades
- Implementation best practices

What you **DID**:

- N/A

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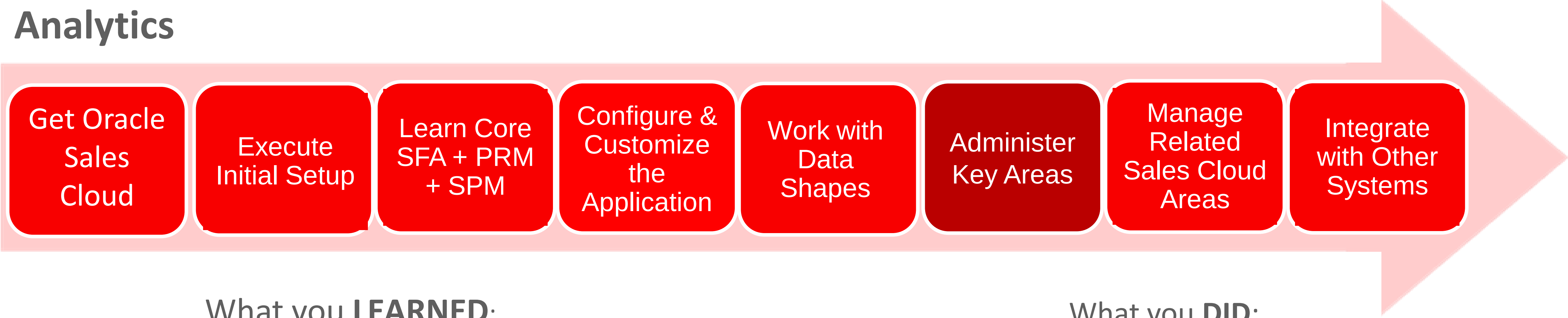
Administer Key Areas

Analytics



What you LEARNED:

- The Different Facets of Oracle Sales Cloud Analytics
- Key Capabilities of Oracle Sales Cloud Analytics
- What's New in R11
- Capabilities offered by Mobile Application Designer (MAD)
- How to work with different Analytical Use Cases
- How to leverage the Power of BI Extensibility
- Key BI Considerations

What you DID:

- Embedded Analytics into the Simplified Pages
- Worked with Custom Subject Areas
- Got exposed to Cross Subject Area joins
- Navigated from a Report to an Object Page
- Adjusted Report Currency
- Created a report using a Calculated Metric
- Embedded an Opportunity Report in an Analytics Subtab within the Detail/Edit page
- Implemented a presentation variable in Oracle Sales Cloud BI
- Explored enabling the Sales Infolet Page and customized the Sales Infolet Page
- Reflected the Current Exchange Rate in Reports for Open Opportunities
- Created a report to perform analysis on Market Development Funds (PRM Reporting)
- Created a MAD App from Subject Area and an Excel Data Source (After Class)
- Updated a MAD Application Using a Plug-In (After Class)

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Administer Key Areas

Customer Data Management + DaaS

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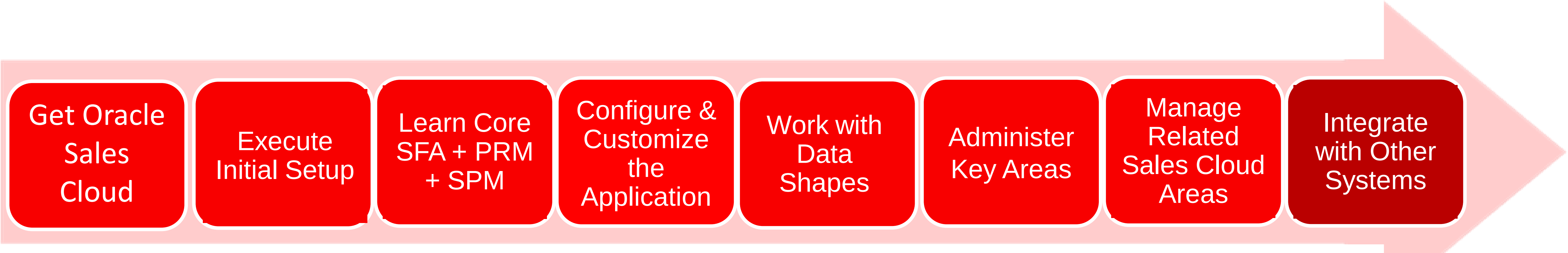
What you **LEARNED**:

- What is Oracle Sales Cloud Customer Hub
- What is included in OSC Customer Hub: Merging, Survivorship, Audit
- How Enterprise Data Quality (EDQ) extends Oracle Customer Hub functionality
- The different configurations available OOTB as part of EDQ
- How changes to Customer Data can be tracked via Audit Reporting
- How Web Services can be utilized for Matching, Cleansing and Merging purposes
- How Oracle Sales Cloud data can be enriched using DaaS

What you **DID (After Class)**:

- Explored how Real-time Data Quality is instituted within Oracle Sales Cloud
- Edited a Predefined Enterprise Data Quality Matching Configuration
- Engaged in Batch Address Cleansing
- Resolved duplicated via Manual Merge, Auto-Merge
- Defined Source System Confidence level and auto-merged duplicate records during file import
- Created a agreement rule and prevented a data merge from occurring
- Utilized Web Services for matching, cleansing and merging
- Configured an Audit Trail for a business object

Integrate with Other Systems



What you **LEARNED**:

- The various Integration points supported
  - Cloud end-points
  - On-Premise end-points
- Different flavors of integration between Oracle Sales Cloud and Siebel
  - Point-to-Point Integration
  - Bi-directional Integration
- How the Integration Cloud Service fosters integration between cloud and on-premise application

What you **DID**:

- N/A

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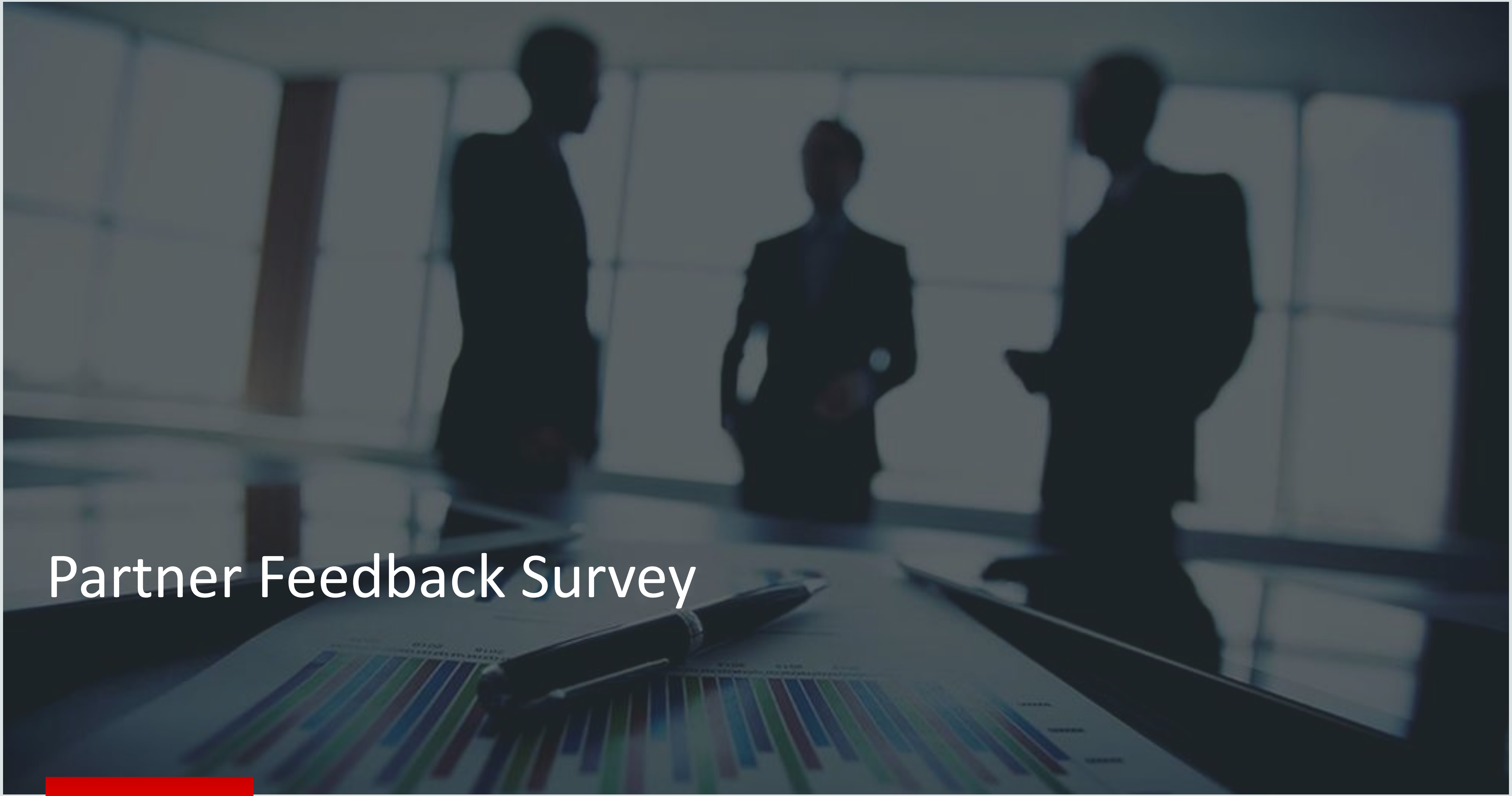
Partner Training Strategy And Next Steps

Oracle Sales Cloud

- Train fellow Oracle Sales Cloud practitioners
- Use current Enablement, Training and Content
- Attend Customer Connect and Partner Connect sessions
- Develop Oracle Sales Cloud Solution Offerings
- Join the Fusion Applications Knowledge Zone
- Leverage OPN's Guided Learning Path
- Join My Oracle Support (MOS) forums
- Get Certified!
- Attend Product Awareness Webinars



Partner Feedback Survey

Q & A

Integrated Cloud

Applications & Platform Services

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