Quick Reference Guide to Transition from Oracle Sales Cloud to Oracle Engagement Cloud

As part of our commitment to provide you with a seamless application experience, Oracle Engagement Cloud is now a unified cloud providing both sales and service capabilities. If your organization has commercially arranged with Oracle to transition from Sales Cloud to Engagement Cloud, consider the following quick tips to get you started as an administrator.

No Application or Business Disruption

- The Sales Cloud to Engagement Cloud transition being a commercial transition, your organization retains the existing entitlements to use the features of Sales Cloud and you gain additional features including the Engagement Cloud service features.
- If you subscribe to additional feature components, such as Oracle Digital Service or Oracle Chat Service, they are also provisioned and associated with your environments through automation.
- For additional components, the provisioning typically occurs within 3-7 days.

My users have not noticed a change, is there something I need to do?

By design, it is important that you control when the additional features you are entitled to are available to your end users. This allows you to plan when and how to deploy the new features. Until you take a few administrative steps to enable these additional features, your users will not experience a change.

Depending on a feature's nature and scale, you may choose to run an enablement project and plan new feature deployment using an innovation release. You can plan innovation releases every three or six months to assess, test, deploy, and socialize new features to end users. Such innovation releases facilitate an environment of continuous, visible improvement that helps users perform their

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Oracle Engagement Cloud combines sales and service capabilities in one solution.

TARGET AUDIENCE

Administrators that need to determine if their Service features are provisioned and enabled.

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tasks more efficiently. This ensures that the business value your organization realizes from the service is optimized, capturing all that is available to you.

Steps to Enable your Engagement Cloud Offerings

You can enable the Engagement Cloud offerings in nonproduction and production environments as follows.

Opt in using the Setup and Maintenance work area:

1. Click the **Navigator**, and then click **Setup and Maintenance**.
2. On the Setup and Maintenance page, select your offering, and then click **Change Feature Opt In**.
3. On the Opt In page, click the **Edit Features** icon.
4. On the Edit Features page, select the **Enable** option for any feature you want to opt in to. If the Enable column includes an Edit icon instead of a check box, then click the icon, select your feature options, and click **Save and Close**.
5. Click **Done**.

How do you know Knowledge Management is provisioned and enabled?

Knowledge Management is included and provisioned for all Engagement Cloud Editions, except for the Professional Edition.

To enable the Knowledge Management service:

1. On the Setup and Maintenance page, select the **Service** offering.
2. On the **Setup: Service** page, click **Change Feature Opt In**. The **Opt In: Service** page opens.
3. Select the **Knowledge Management** service, and check **Enable**.

For more information on enabling and configuring Knowledge Management and scheduling Knowledge Management processes, see the Enabling Knowledge Features section in the Oracle Engagement Cloud Using Engagement guide, available on the Oracle Help Center.

How do you know if separately purchased Service entitlements are provisioned and enabled?

To check if the Oracle Digital Customer Service is provisioned:

1. Sign in to Oracle Cloud as a Service Administrator.
2. Click the Dashboard icon to open the My Services Dashboard page.
3. Click the Customize Dashboard tile to make sure you "Show" your services.

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4. Check to see if you have an option to create a Digital Customer Service
    instance, or the Digital Customer Service tile with a link an already
    created instance.

To enable the Digital Customer Service in Engagement Cloud, follow the
instructions in the Configuring Digital Customer Service for Initial Use section of
the Oracle Engagement Guide Implementing Digital Customer Service in
Engagement Cloud guide, available on the Oracle Help Center.

To enable the optional Chat service:

1. On the Setup and Maintenance page, select the **Service** offering.
2. On the **Setup: Service** page, click **Change Feature Opt In**. The **Opt In:
    Service** page opens.
3. Select the **Communication Channels** service, and click the **Features**
    icon. The **Edit Features: Communication Channels** page opens.
4. Select the **Chat** feature and check **Enable**.

For more information on setting up the Chat service, see the Setting Up Chat
section in the Oracle Engagement Cloud Implementing Service in Engagement
Cloud guide, available on the Oracle Help Center.

Are There Any Additional Administrator Resources?

-   Oracle LaunchPad: Getting Started with Engagement Cloud
-   Oracle Engagement Cloud - Sales and Service: Get Started with your
    Implementation
-   Oracle Engagement Cloud Recommended Training data sheet
-   Oracle Implementation and Management Series data sheet
-   Oracle Sales and Engagement Cloud Resource Centers and Implementation Notes
-   Oracle Customer Connect: Customer Experience
-   Configuring Offerings
-   Implementing Service: Overview

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