

## ANYTIME, ANYWHERE ACCESS

Access Oracle Sales Cloud on smart phones, tablets and Outlook to maximize selling time.

## ORACLE SALES CLOUD MOBILE

To access Release 8 mobile capabilities, you must download the newest version of Oracle Sales Cloud Mobile from the Apple App Store (iPhone and iPad), Google Play (Android), or the Oracle Sales Cloud instance (Blackberry).

## SUPPORT FOR DISCONNECTED MODE

Oracle Sales Cloud Mobile now provides read-only access to Oracle Sales Cloud data in disconnected mode. To access specific records in disconnected mode, simply save your records locally on your mobile device. Additionally, Oracle Sales Cloud Mobile automatically stores all recently accessed data and makes it available to you when your device is disconnected from the network.

Your company administrator can choose to disable offline mode, or set security policies that Oracle Sales Cloud Mobile will enforce.

## INTEGRATION WITH ORACLE SOCIAL NETWORK

Oracle Sales Cloud Mobile now provides integration with Oracle Social Network. When viewing an opportunity, customer, or lead in Oracle Sales Cloud Mobile, you can easily navigate to the Oracle Social Network application to view, join, or initiate conversations.

## INTERACTIVE ANALYTICS

Oracle Sales Cloud Mobile now provides:

- Drill down navigation – You can drill down from a chart or report to another chart or report that provides more details about the data points in which you are interested.
- Embedded charts – You can embed a chart in a tabular report.
- Hierarchy navigation – You can now expand a hierarchy in tabular reports to view details at the right granularity.

## ENABLE CUSTOM CHILD OBJECTS

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Using Application Composer, you can now create custom mobile pages for child objects. These child-object pages will appear as related information tabs for top-level standard or custom objects in your Oracle Sales Cloud Mobile application.

## CREATE CUSTOMERS

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With Oracle Sales Cloud Mobile, you can now create new accounts, contacts, and households directly using your mobile device.

## ENHANCED ACTIVITY MANAGEMENT

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Using Oracle Sales Cloud Mobile, you can now complete your common, everyday tasks quickly:

- Log an interaction when viewing an appointment
- Create a follow-up task for an appointment
- Create an appointment or interaction from a task
- Remove invitees from an appointment
- Remove assignees from tasks

## SUPPORT FOR SAVED SEARCHES

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Using Oracle Sales Cloud Mobile, you can access saved searches that you created on the Oracle Sales Cloud desktop UI. You'll see your saved searches in the search pane. You can change the result by adding additional dynamic criteria to your saved searches. You can also refine your queries using different search operators, such as 'equal', 'begins with', 'contains', and 'ends with'.

## AUTOMATIC GEOCODING

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With Oracle Sales Cloud Mobile, you can search for customers, contacts, leads, and opportunities near your current location and view details about them. This feature is now available without any customizations. When you

enter a new address in Oracle Sales Cloud, the address is automatically geo-coded providing you visibility into sales data near your current location.

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## ORACLE SALES CLOUD FOR OUTLOOK

Oracle Sales Cloud works seamlessly with the application that sales representatives use the most: Microsoft Outlook™. This powerful integration allows your representatives to see, and manage, all critical data right from within Outlook.

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## OUTLOOK CONFIGURATION IN APPLICATION COMPOSER

Using Application Composer, you can now customize Oracle Sales Cloud for Outlook including the layout, data synchronization settings, record-level event validation, and installation settings. With Release 8, you can now manage customizations on all Sales Cloud channels (mobile, web, and Outlook) in a single tool.

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## CUSTOMERS AND CONTACTS AS FAVORITES

You can now mark your favorite customers and contacts within Microsoft Outlook and use the My Favorites filter to easily find them in Outlook. You can also reduce synchronization times by only synchronizing favorites.

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## ONLINE LOOKUP

You can now directly look up contacts, leads, opportunities, products, product groups, and resources in Oracle Sales Cloud, and associate them with Outlook records. For example, when creating an opportunity in Outlook, you can look up a product in Oracle Sales Cloud and associate it with a revenue line without requiring the product to be synchronized with Outlook first. This reduces synchronization times by reducing the amount of data that must be synchronized with Outlook.

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## IMPROVED SYNCHRONIZATION

Attachments to Microsoft Outlook messages are now downloaded only when you actually open the attachment, which reduces the data volume handled during a synchronization and shortens synchronization times.

In addition, Oracle Sales Cloud for Outlook generates a diagnostics file that summarizes the synchronization issues, conflicts, and errors. This file can be automatically forwarded to a central network location or accessed by sales representatives or sales managers from the Microsoft Outlook client.

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## CTI INTEGRATION FOR DESKTOP UI

Communicate with customers through phone and web chat with Oracle Sales Cloud and your integrated CTI device.

### WEB CHAT

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Web chat is a new communication channel for this release. Using Oracle Sales Cloud with CTI Integration, you can now chat online from a toolbar. When specific phone numbers are associated with a customer, a Customer Information screen displays detailed information about the customer who is on the chat.

### PHONE CHAT

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You can answer and transfer calls using the new phone chat toolbar. You can also place a caller on hold and engage with up to three other lines at the same time. This allows you to consult with experts and members of the account team on other lines.

## EXTENSIBILITY

Oracle Sales Cloud provides a rich architecture for extending and customizing the application to work the way you need to. With Release 8, you can now customize the simplified user interface with these new options.

### DYNAMIC LAYOUTS

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Using Dynamic Layouts, you can edit the default layouts for Create and Edit pages (including subtabs) to display different information based on the user role, type of object, or other criteria, such as record status.

### CONFIGURING SUBTABS

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On Edit pages you can create subtabs to display related information, including:

- Child and related objects
- Common components
- Read-only transactional data from external applications
- External information from the web

Sales representatives and sales managers can also hide, show, reorder or rename their subtabs.

## ACTIONS MENU CONFIGURATION

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You can now show, hide, or reorder the actions that appear in the Actions menu. You can also create and edit custom actions.

## CONFIGURING ACTION BUTTONS

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You can now show, hide, or reorder standard action buttons. You can also create, edit, show, hide, or reorder custom action buttons on Overview pages, Edit pages, and subtabs.

## CONFIGURING LINKS

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You can now add custom links to pages in Oracle Sales Cloud. You can create, edit, show, hide, or reorder custom links; and you can show, hide, or reorder standard links.

## ENABLING DRILL-DOWN LINKS

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You can now enable a drill-down link to navigate to the details of a related object. These links can be enabled for extensible standard objects in list pages, subtabs, and edit pages. When drill down is enabled on the custom dynamic choice list on an edit page, the field initially is a regular choice list. Upon selection of the field, the field becomes a drill-down link, with an option to clear the value and select another value.

## ACCOUNT AND CONTACT MANAGEMENT

Know your customers with a complete 360-degree view of your accounts, contacts, and households.

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### ACCOUNT MANAGEMENT

## ACCOUNT OVERVIEW AND EDIT PAGE IMPROVEMENTS IN SIMPLIFIED UI

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Improvements to the Account Overview and Edit Pages include:

- An Account Overview page that shows assets (purchased by the customer), product recommendations, and interactions.
- Ability to add and manage attachments from the account profile.
- Ability to see sales representatives assigned to the account using territory assignment.
- A “Do Not Contact” indication for the account’s phone, email, or mailing address.
- An option to delete an account record from the Actions menu.

## ASSET MANAGEMENT AND PRODUCT RECOMMENDATIONS

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Asset Management, a new feature in Release 8, tracks the products your customers own. You can view and edit customer products without logging into a separate application. You can also import asset data from external asset management applications.

You can also get product recommendations based on your customer’s profile and asset data. The recommendations are generated using business rules defined in Sales Predictor.

## ACCOUNT HIERARCHY

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With Release 8, you can get a quick graphical snapshot of your customer’s entire company hierarchy. You can make modifications to the hierarchy in graphical or tabular form.

## DATA QUALITY AND ENRICHMENT

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When you create a new account record, potential duplicates are automatically brought to your attention. You can also verify whether the company address is correct. Release 8 also includes the Oracle Social Data and Insight Cloud Service that adds Dun & Bradstreet® data to your customer profiles.

## MANAGING CUSTOMER AND CONTACT RELATIONSHIPS

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The new Relationships tab provides a comprehensive view of all the companies and contacts associated with your customer. You can easily manage business-to-business relationships, business-to-contact relationships, or contact-to-contact relationships.

## DESKTOP USER INTERFACE IMPROVEMENTS

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Improvements to the desktop user interface allow you to:

- Customize the Sales Account region on the Account Team node.

- View and update account and contact source system information in the OSR node.
- Configure customer tree nodes for accounts, contacts, and households in the Manage Customer Tree setup task.
- Disable territory assignment after batch import using a new profile option.

In addition, managers have automatic visibility into their team's accounts. No additional work is required to grant visibility when an organization is restructured.

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## CONTACT MANAGEMENT

Manage critical information about your contacts, whether they are contacts related to accounts (B2B), direct customers (B2C), or other business contacts.

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### CONTACT OVERVIEW AND EDIT PAGE IMPROVEMENTS

You can now manage all contacts whether they are business contacts, clients, investors, students, prospects, or simply people you want to track. You can now:

- View all leads, opportunities, and interactions associated with the contact in the Contact Overview page.
- Include file attachments for the contact.
- Manage additional information for contacts such as job title, affinity, and buying role.
- Set a “Do Not Contact” indication for the contact's phone, email, or mailing address.
- Delete a contact record from the Actions menu.

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### ASSETS AND PRODUCT RECOMMENDATIONS

Asset Management, a new feature in Release 8, tracks the products your customers own. You can view and edit customer products without logging into a separate application. You can also import asset data from external asset management applications.

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### CONTACT RELATIONSHIP MANAGEMENT

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## DATA QUALITY AND ENRICHMENT

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When you create a new contact record, potential duplicates are automatically brought to your attention. You can also verify whether the contact address is correct.

## DESKTOP USER INTERFACE IMPROVEMENTS

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A contact might be an account-related (B2B) contact or a direct customer (B2C) contact. Customer Center now offers a view selector that allows you to switch between the contact and customer trees.

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## HOUSEHOLD MANAGEMENT

With Release 8, you can track and manage information about a family. Households are commonly used in the Financial Services industry.

You can define a family and its members as a household. All of the capabilities for account and contact management are now available for households, including:

- A 360-degree view of all transactions with the household in the Household Overview page.
- A list of all family members, such as head of household, wife, and children in the Contacts tab.
- Associated leads and opportunities.
- Assets that the family owns.
- Notes, tasks, and appointments.
- Conversations.

## SALES ANALYTICS AND REPORTING

Use information to visualize, track, and act on pipeline and forecast trends.

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## SALES ANALYTICS

Oracle Sales Cloud Analytics helps you sell more by providing insights into key trends that impact your bottom line.

## CONFIGURABLE SALES DASHBOARD

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The new Sales Dashboard contains pre-built reports and charts that help you sell more. These reports provide insights into your open pipeline, deals that moved out of the current quarter, team performance, and historical opportunity trends. You can tailor these reports for sales executives, sales managers, or sales representatives.

## HISTORICAL OPPORTUNITY TRENDING

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You can now create custom reports to track the historical progression of opportunities across sales stages.

Review daily, weekly, monthly, quarterly or yearly revenue trends; and further analyze revenue trends by product, resource or territory.

## HISTORICAL FORECAST TRENDING

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You can now analyze forecast trends and compare the forecast to key analytics such as pipeline, won revenue, and quota. Forecast metrics will remain historically consistent and accurate across forecasting periods even if product or territory hierarchies change.

## EMBEDDED REPORTS IN SIMPLIFIED UI

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You can tailor the Oracle Sales Cloud simplified UI to show standard or custom reports where your sales team needs them most.

Use Page Composer to embed actionable reports on the following pages:

- Analytics Page: The Analytics homepage includes eight subtabs for reports. The first three subtabs show standard reports. The other five subtabs are customizable, but hidden and blank by default.
- List Pages: The Leads, Opportunities, Accounts and Contacts list pages include three subtabs for reports. These tabs are customizable, but hidden and blank by default.
- Detail Pages: The Leads Opportunities, Accounts, and Contacts detail pages include three subtabs for reports. These tabs are customizable, but hidden and blank by default.

## PRE-BUILT REPORTS FOR LEADS, OPPORTUNITIES, ACCOUNTS, FORECAST, AND PARTNERS

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You can now use these preconfigured reports to measure your sales performance:

- Leads: Team's Leads, My Leads by Age, and My Open Leads by Source.
- Opportunities: My Team's Performance, My Team's Pipeline, My Team's Leadership Board, My Performance, My Pipeline, Top Open Opportunities, Sales Performance Trend, and Sales Stages by Age.
- Accounts: My Top Accounts.
- Forecast: Forecast Compared with Quota, Team Forecast Compared with Team Open Pipeline, and My Forecast Compared with My Open Pipeline.
- Partners: Partner Performance, Open Pipeline, Partner Leadership Board, and Partner Win Rate.

## CUSTOM REPORTS FOR OPPORTUNITY TEAM AND CONTACTS

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The following two new subject areas allow you to create custom reports on opportunity team and opportunity contact:

- Sales - CRM Opportunity Team
- Sales - CRM Opportunity Contact

These subject areas include the details about the role of the team members and the role of the contact on each opportunity. These subject areas also allow you to generate a report of a summary view of all the opportunities involving a team member or a contact.

## CUSTOM REPORTS FOR ACCOUNT TEAM

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The following new subject area allows you to create custom reports on Account Team:

- Sales - CRM Account Team

This subject area includes the details about the role of the team members on each account. The subject area also allows you to generate a report of a summary view of all the accounts involving a team member.

## REPORTING ON CONTACT ATTRIBUTES

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With the new contact model enhancements, you can create custom reports about standard contact attributes, such as job title, sales affinity, and relationships between accounts and contacts.

The Contact model now uses the same security rules as the Contact object in Oracle Sales Cloud. This ensures that you can see the contact data in the report only if you have access to the contact data.

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## AUDIT REPORTING

Audit reporting allows you to track the usage of the Oracle Sales Cloud application. With audit reports, you can see who made what changes in the application and when. You can also configure your reports to control who can view the audit information.

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## SALES PREDICTOR

Using the Attribute Analysis report, you can determine which customer attributes are important for lead generation and qualification based on data quality. The Association Model report provides critical information

about products that are frequently sold together. The insight provided by these reports can be used to improve your prediction rules, help you better understand hidden buying patterns, and generate cross-sell opportunities with existing customers. You can also preview your leads with this intelligence in mind, ensuring only the best leads are pushed out to the field.

## PIPELINE AND FORECAST MANAGEMENT

Track your pipeline and close your forecast in a predictable way

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## OPPORTUNITY MANAGEMENT

Use Oracle Sales Cloud to track the full life cycle of an opportunity, from initial qualification to close.

### YEARLY TIME PERIODS

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You can now view your list of opportunities by year, in addition to the quarterly periods. The yearly view options include current year, previous year, or up to three future years.

### LEAD ASSOCIATION

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You can now track the relationship between leads and opportunities more closely from the Leads tab on an Opportunity record. The Leads list shows the originating lead and leads that have been added to the opportunity manually.

### AUTOMATIC ASSIGNMENT

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Using the Save and Run Assignment action, you can start an automated assignment process for a specific opportunity separate from the batch assignment process.

### ATTACHMENTS

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You can now add and manage multiple files or URL links as attachments to an opportunity record.

## OPPORTUNITY CLOSE

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The Edit Opportunity page now includes the fields required to close an opportunity, such as your competitor and the reasons for your win or loss. By updating these fields, you can close an opportunity without having to drill into the Close Opportunity page.

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## SALES FORECASTING

View, manage, and submit forecasts from your desktop or mobile devices and use embedded analytics to improve forecast accuracy.

## SIMPLIFIED UI FOR SALES REPRESENTATIVE FORECASTING

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You can now view, manage, and submit your forecasts from the simplified UI, in addition to the desktop UI and mobile application. With the simplified user interface and embedded analytics, you can manage and submit your forecasts more effectively and accurately.

## MARKETING AND LEAD GENERATION

Generate new leads with self-service marketing capabilities and predictive analytics.

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## LEAD MANAGEMENT

Manage the entire life cycle of sales leads, from first contact to conversion.

## LEAD-OPPORTUNITY ASSOCIATION

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Opportunities created from lead conversion are now listed on the Opportunities tab for leads. From a lead record, you can view the Opportunities list, add existing opportunities to the list, or drill down to view opportunity details.

## MASS UPDATE

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Now available from the Oracle Sales Cloud desktop UI, the Mass Update feature allows you to change the data in one or more fields for many leads at the same time.

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## SALES CAMPAIGNS

Design and manage campaigns, define target segments and lists, and design marketing treatments.

### SIMPLIFIED USER INTERFACE FOR SALES CAMPAIGNS

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The new Sales Campaigns UI provides a guided process for you to view and select email templates and edit content in an email editor.

The campaign summary page shows a summary of the campaigns within the last three months, including a click-rate analysis.

## SALES PERFORMANCE MANAGEMENT

Optimize sales performance by modeling territories and sales quotas according to business objectives.

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## TERRITORY MANAGEMENT

Model sales territories efficiently and evaluate the effectiveness of territory models to increase sales performance.

### FILE-BASED DATA IMPORT AND EXPORT FOR TERRITORIES

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You can export and import all or part of your territory definitions into new territory proposals. Export and import operations together allow you to:

- Set up initial territory definitions using import
- Analyze and edit territory definitions offline
- Migrate territory definitions from one environment to another

### EXTEND TERRITORY MANAGEMENT WITH APPLICATION COMPOSER

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With Release 8, you can now use Application Composer to extend Territory Management for your business needs. For example, you can define custom attributes and related objects for territories and proposals. You can also create notifications to alert sales people whenever their territories change.

## UNIQUE IDENTIFIERS FOR TERRITORIES AND PROPOSALS

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Oracle Sales Cloud now assigns unique identifiers to territories and territory proposals. These unique identifiers can help you find and identify the right territory wherever they are used, including during export and import operations.

## TERRITORY TEAM ENHANCEMENTS

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You can now use operators and specify multiple criteria when searching for resources to add to the territory team. You can also export the list of team members in a territory.

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## QUOTA MANAGEMENT

Product and unit quotas that you allocate to your sales representatives are directly linked to your measurable sales goals.

## PRODUCT AND UNIT BASED QUOTAS

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You can now flexibly define any number of sales goals for your organization and assign quotas to these goals to track the performance of your sales force.

You can align sales quotas to your business objectives by defining sales goals that are focused on a particular set of product groups. You can then assign product-based quotas to your sales people.

You can also define sales goals that are measured in units as opposed to revenue amount, and assign quotas for these goals to your sales people.

In addition, you can now assign multiple sales quotas to your sales people for different goals.

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## INCENTIVE COMPENSATION

You can use the Manage Incentive Compensation process to perform complex calculations for nondiscretionary incentive plans, such as sales commission plans or bonuses with formulaic calculations. You can adjust incentive plans for all organizations, measure performance in relation to metrics, reward appropriate behavior, and analyze the effect of incentive programs on financial and sales goals.

## PARTICIPANT COMMISSION STATEMENT

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Participants can use the new Participant Commission Statement dashboard to view their period attainment summary, payment summary, payment details, and payment balance information.

## EXPORT AND IMPORT PLANS

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Incentive compensation plan administrators can migrate compensation plans from one environment to another, for example, from a development environment to a production environment. Plan administrators can also roll out plans to different business units when business units have similar plans.

- **Export Plans.** You can export valid compensation plans to an XML file using the Manage Compensation Plans task. All of the underlying plan objects, such as plan components, performance measures, rate table, rate dimensions, expressions, and credit categories associated with the compensation plan are included in the export.
- **Import Plans.** You can import previously exported compensation plans into the same environment or into another environment using the Compensation Plan Import task. While importing plans, you can provide a new set of start and end dates, as well as specify a prefix or suffix to rename the imported plan.

## VIEW PROCESS LOG DETAIL

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You can view debug log details through an application UI, rather than using SQL to access the database. The new UI supports the following processes:

- **Calculation.** You can calculate commission and bonuses to encourage behavior that aligns with corporate performance and financial objectives.
- **Classification.** You can classify transactions and credits into appropriate categories so that different incentive rewards can be applied to performance in different lines of business, such as product lines and channels.
- **Crediting and roll up.** You can run crediting and roll-up processes to determine which direct and indirect credit receivers are associated with each business transaction.
- **Payment batch.** You can group participant paysheets into batches that can be approved and sent to payment systems.

## SIMPLIFIED CALCULATION PROCESS

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You can use a new, simplified calculation process to run or schedule calculations for all participants in a business unit. To automate your end-to-end processing with Oracle Sales Cloud, you can also include this calculation process as part of a set of incentive compensation processes. For selected participants, you can still create a calculation request and then submit it.

## IMPORT PARTICIPANT GOALS

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You can import participant goals by entering goal data in a file, or by exporting source goal data to a file, and then uploading the file to the Oracle WebCenter Content repository. You can then run or schedule a process to import the data from the file into Oracle Incentive Compensation cloud services. Web services for importing participant goals are also available.

## IMPORT AND UPDATE PARTICIPANT DETAIL

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You can import participant detail information by entering detail data in a file, or by exporting source detail data to a file, and then uploading the file to the Oracle WebCenter Content repository. You can then run, or schedule, a process to import the data from the file into Oracle Incentive Compensation cloud services. Web services for importing and updating participant detail information are also available.

You must provide the start dates for detail records because multiple detail records might be associated with a participant.

## ESTIMATE COMPENSATION

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You can now estimate compensation based on the expected closure of sales deals.

Sales representatives enter their pipeline opportunities and generate estimates for selected transactions. They can modify opportunity attributes, such as amount and quantity, and perform a what-if analysis without affecting the opportunity transactions.

You can do the following:

- Prioritize deals by using real-time data to determine where to focus participant sales activity and decide how to structure opportunities to maximize commission and bonus incentives.
- Increase forecast accuracy by motivating participants to enter accurate opportunity data.

Using this visibility into sales deals to help participants prioritize their efforts, you can encourage the participant behavior that you want and help participants align their objectives with those of their company.

## PARTNER RELATIONSHIP MANAGEMENT

Streamline partner management and indirect sales processes to increase the value of your network of partners.

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## PARTNER RELATIONSHIP MANAGEMENT ENHANCEMENTS

### FLEXIBLE APPROVALS

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You can set up simple or parallel approval flows to streamline partner enrollment. For example, you can route enrollment requests directly to the channel managers who cover the region, or concurrently send requests to the marketing division who created the programs.

### PARTNER EXTENSIBILITY

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You can now add custom attributes to Partner and Partner Team objects.

### PARTNER-TO-PARTNER RELATIONSHIPS

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You can define relationships between partners. For example, you can define a relationship to identify the distributor a particular partner works with.

### ASSIGN PARTNER COMPANIES TO TERRITORIES

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You can now use territory assignment rules to assign channel manager territories to the partner organizations they manage. This allows your channel managers to get visibility into the activities of all partners in their territory.

### OPTIONAL PARTNER USER PROVISIONING

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User account creation is now optional when activating a partner organization in Oracle Sales Cloud. You can decide when to create partner accounts and partner user accounts depending on your business objectives and processes.

### OPTIONAL CONTRACTS IMPLEMENTATION

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You can now create partner programs without setting up a corresponding partner contract template in Fusion Enterprise Contracts.

## CUSTOMER DATA MANAGEMENT

Release 8 provides additional Customer Hub and Data Quality capabilities to help sales administrators maintain clean and accurate customer data.

### AUTOMERGE ADMINISTRATION

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Release 8 automates the process of merging account and contact records based on a company's governance rules that include attribute confidence levels. An administrator, such as a data steward, can create and define business rules to merge duplicate account or contact records automatically depending on the source of the record. For example, you can assign a higher confidence score to an attribute if it comes from a banking system over a marketing system. These are referred to as survivorship rules. The survivorship feature allows you to do the following:

- Define business rules using standard or custom attributes.
- Define relative data quality reliability scores, called source confidence scores, for all sources contributing to the master customer records (on a scale of 0-100). You can define a source confidence score for the source of each attribute.
- Activate pre-built business rules included in the product.

In Oracle Sales Cloud, you can consolidate records from multiple sources, such as ERP, CRM, or custom applications. You can also track the source application that updates specific attributes of your customer record.

### ACCOUNT AND CONTACT ENRICHMENT

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You can now use business information from Oracle Social Data and Insight Cloud Service to:

- Add key business information such as the D-U-N-S Number, industry classifications, number of employees, or annual revenue to your existing accounts.
- Improve the quality of your existing contact data with accurate, phone numbers, email addresses, job titles, and company information.
- Import new companies as accounts, and import new contacts into existing accounts.
- Maintain current information for your accounts and contacts on an ongoing basis.

### OUTBOUND REAL-TIME INTEGRATION

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Outbound real-time integration helps you integrate external applications with Oracle Sales Cloud for customer data synchronization. Using Object Workflow in Application Composer, you can track changes to Account, Contact, and Household objects, including changes to child objects. When you make multiple changes within an object hierarchy, Oracle Sales Cloud now triggers only one workflow event.

## SETUP AND ADMINISTRATION

Use Oracle's purpose-built tools to set up and maintain the Oracle Sales Cloud application for your unique business requirements.

### MIGRATE CUSTOMIZATIONS

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Using the Customization Migration feature, you can now migrate the following from your source to target instance:

- Email templates and associated attachments
- Security changes made within Application Composer including privileges granted for custom objects
- Oracle Business Intelligence reports, dashboards, and custom subject areas

Customization Migration allows you to migrate between instances at different patch levels, but they must be at the same release level.

### MASTER GEOGRAPHIES LOAD

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Using the Import Nokia Data option, you no longer have to source geography data from a third-party. You can load master geography data from Nokia (previously Navteq), including the country structure and hierarchy information.

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## TERRITORY MANAGEMENT SETUP

### FILE-BASED DATA IMPORT FOR TERRITORY GEOGRAPHIES

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You can now import a complete or partial territory geography hierarchy using a flat file. This allows you to define territory geographies offline and import them to various environments.

### DIAGNOSTIC TOOLS FOR ASSIGNMENT MANAGER

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You can now use the assignment diagnostic mode to:

- Troubleshoot unexpected territory or resource assignment results.
- Monitor the day's high-volume batch assignment processes and track the progress, performance, and failure rates.
- Identify the transactions that failed and the cause of the failure for each batch assignment process.

- View a report that can help you adjust territory assignment processing.

## IMPROVEMENTS TO SETUP UI

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The Enable Dimension and Metrics page has been enhanced as follows:

- You can now select classification categories when you are enabling classification-based dimensions, like the auxiliary and industry dimensions. You no longer need to go to additional setup tasks.
- You now see only the enabled dimensions and metrics on the page. Enabling more dimensions or metrics is as simple as adding to the list.
- You can see the synchronization status broken down by the load process status and the activation status.
- You no longer need to create a stage environment before making changes on the Enable Dimensions and Metrics page. In fact, the environment selector has been removed.

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## FILE-BASED DATA IMPORT

File-based data import allows you to import data from external sources using CSV or XML files.

## PREDEFINED IMPORT MAPPINGS

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You can now download template files with predefined mappings directly from the Manage Import Mappings page. You can then add your data directly to the template and import it into Oracle Sales Cloud using the mapping definitions.

## USABILITY ENHANCEMENTS

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Improvements to usability make importing data easier, for instance:

- During an import, only fields that apply to the object that you are importing are displayed.
- Attachment import uses a standard file selection field that renders faster, and is easier to use.
- During the Create Import Activities task, the Object field now supports translation.
- When viewing the Import Activity Status page, you can refresh the log file view.

## IMPROVED ERROR HANDLING AND LOGGING

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The following enhancements to error handling and logging allow you to resolve import errors faster.

- Error logs are easier to read without complex cascading error messages. This enhancement reduces the number of errors in the file, making it easier for you to identify the core issue.
- Error messages now display the column name used in the input file, which helps you identify the data causing the error. Error messages that are common to various objects have also been standardized.

You can refresh the process log without reloading the page. You can also export the contents of the process log for external review and filter the messages based on message type.



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**Hardware and Software, Engineered to Work Together**

R8\_Sales\_RCD\_07Mar2014