

Actionable Infolets on your Task-Based Home Page

Oracle CX Sales and B2B Service

We strongly recommend using Actionable Infolets to make your CX Sales and B2B Service home page efficient, effective and task-based.

Deploying Actionable Infolets is quite simple, but we're here to guide and help you with our recommendations.

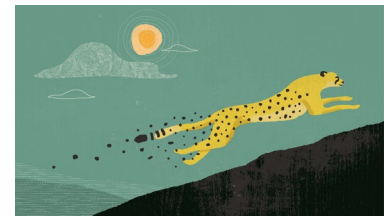
Actionable Infolets were introduced back in Update 18B, so early 2018, and have been successfully used by many customers.

Actionable Infolets are not currently exposed by default and you might not realized how valuable they are, missing the opportunity to leverage them as a key component of your CX Sales and B2B Service application. The purpose of this documentation is to make you fully aware of Actionable Infolets and a Task-Based user interface, so you can take advantage of them.

Below are the best practices for deploying Actionable Infolets, using a simple checklist approach to keep things organized.

Please contact [Oracle Support](#) if you require technical assistance.

For additional assistance, where applicable, consult with your Oracle Implementation Partner.



Target Audience

- Business Administrator
- Application Administrator
- Project Manager
- Implementer

More Feature Kit Components

- [Introductory Video](#)
- [Do You Know document](#)

Quick Links to Resources

- [Actionable Infolets](#)
- [Implementation & Management Series](#)
- [Verify Certification Badges](#)
- [Recommended Training for Customers](#)
- [Best Practices Resource Centers](#)
- [My Oracle Support \(MOS\)](#)
- [Oracle Help Center](#)

Other Helpful Links

- [System Requirements](#)
- [Oracle University](#)
- [Oracle Partner Finder](#)

Connect with us

- [Customer Connect Sales Forum](#)

Enable, Configure and Promote Actionable Infolets

- ❑ **Enable** Actionable Infolets using the Structure tool. Detailed steps are provided in the [Actionable Infolets](#) chapter of the Implementing Sales guide.
- ❑ Include Actionable Infolets as the **primary content** on your first Analytics tab.
- ❑ Decide if you want your users to be able to **personalize** their Actionable Infolets. If so, set the ZBS_ENABLE_ACTIONABLE_INFOLET_PERSONALIZATION profile option to “YES.”
 - ❑ If you allow users to personalize their Actionable Infolets, make sure they know about this feature, how to use it and where they can go for help if needed.
- ❑ Actionable infolets are secured through the "View Sales Homepage pagination dot one" and the "View Sales Representative Dashboard" privileges. Ensure users have these two privileges.
- ❑ **Configure** you Actionable Infolets to meet role specific needs. For example:
 - ❑ Switch Actionable Infolets to Use Workspace Saved Searches as Filters.
 - ❑ Note that if choose to include Workspace Saved Searches they will automatically be considered as “Selected” filters. Move other filters to “Available” if they are not applicable to your processes.
 - ❑ Create the Infolet View That Salespeople See by Default
 - ❑ Create Additional Actions for Actionable Infolets. Note that new actions can update sales information, but cannot open new pages or navigate to other pages.
 - ❑ Detailed steps are provided in the [Configure Infolets](#) chapter of the Getting Started with Your Sales Implementation guide. As the Infolets are role specific, you will use Page Composer in conjunction with Application Composer tools.
- ❑ Actionable Infolets are most effective when used **in conjunction** with the Newsfeed Home Page Layout and Workspace features. Refer to the relevant Feature Kits to understand these complementary features.
 - ❑ [Newsfeed Home Page Layout](#)
 - ❑ [Workspace](#)
- ❑ **Communicate** to your user communities the availability, expected use and benefits of Actionable Infolets and personalization features if enabled. Consider providing a short recorded training video, quick reference card or other help tools.
- ❑ **Monitor Release Readiness** and stay on top of future enhancements to Actionable Infolets.
 - ❑ Use the [Cloud Application Readiness](#) page on Customer Connect for links to latest readiness material
 - ❑ Review past Customer Connect sessions that have included news about Actionable Infolets.
 - ❑ [Sales – 19D CX Sales Updates: SFA & PRM](#)
 - ❑ [Sales – 20A CX Sales Updates: SFA and PRM](#)
 - ❑ [Sales – CX Sales 20B-C Updates for SFA and PRM](#)
- ❑ As they become available via your Quarterly Updates, reassess and apply **enhancements to Actionable Infolets** and related features. This may include additional pre-built Infolets, expanded and simpler feature administration and greater integration with Workspace for more reusability of filters and consistency of user experience.
- ❑ **Provide your feedback** – we’ll be listening on the [Customer Connect Sales Forum](#) . Use the “Common: Reporting and Analytics” tag if you log an idea for enhancing Actionable Infolets on [Ideas Lab](#).

ESSENTIAL RESOURCES:

[Actionable Infolets](#) chapter of the Implementing Sales guide.

[Infolets](#) chapter of the Using Sales guide.

[Configure Infolets](#) chapter of the Getting Started with Your Sales Implementation guide.

[Creating and Administering Analytics](#) guide.

[Newsfeed Home Page Layout](#) (Feature Kit)

[Workspace](#) (Feature Kit)

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