

Best Practices for Deploying Smart Lists

Oracle CX Sales and B2B Service

Hyper-Personalization for your users!

Smart Lists work by tracking and adapting to user needs. Your users see information relevant to only them, such as the sales records and the record types they use and search.

What are Smart Lists?

Smart lists are based on an underlying User Context Relevancy Engine. It's a new paradigm that governs how your smart lists will work. It combines pre-seeded metadata and rules to track usage and assign a relevancy score for each User, Object Type and Object.

With smart lists enabled, your users will experience a hyper-personalized CX Sales interface that gives them the sales information most relevant to them. No more searching - your users will be presented with the information they need.

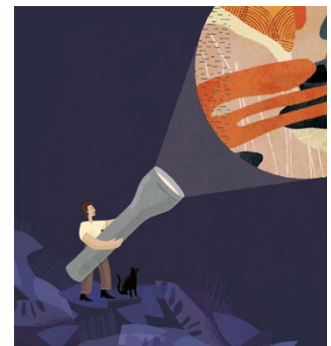
And you can configure how it works in your organization!

How Smart Lists Work

Smart List's User Context Relevancy Engine assigns a relevancy score based on:

- Recency: the last time a user interacted with an object.
- Frequency: how frequently a user interacts with the object

Smart lists are currently available for accounts, contacts, leads, opportunities, and partners in Workspace, Actionable Infolets, and the CX Sales Mobile app.



Target Audience

- Business Administrator
- Application Administrator
- Business Manager
- Project Manager
- Implementer

More Kit Components

- [Video](#)
- [Do You Know About Smart Lists](#)

Quick Links to Resources

- [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

- [Cloud Customer Connect for Sales](#)

SETTING UP SMART LISTS

Smart Lists are already enabled in your Oracle application!

All you need to do is define how you want them to work to your organization.

- Ensure Workspace is enabled and configured for your application. Smart lists use the underlying adaptive search capability of Workspace.
- Enable profile options:
 - ZCA_UC_FEED_TIMEFRAME (Relevancy Feed Calculation Time)
 - ZCA_UC_MAX_USERS_IN_CHILD_JOB (Maximum Number of Users Processed by Child Job)
- Run the Generate Relevancy Feed scheduled process to specify how often you want the smart lists refreshed.
- Run the Age User Context Relevancy Feed scheduled process to remove items that are unchanged and no longer relevant.

For more information about setting up Smart Lists, see the [Generate Relevancy and Age User Context Feeds for Workspace Smart Lists](#) section of the Implementing Sales guide.

BEST PRACTICES FOR USING SMART LISTS

Excluding Users from Relevancy Score Calculations

Relevancy feeds and scores influence a sales person's user context and smart lists. It is possible that not all your users are sales persons and do not require relevancy score calculations to be run.

To exclude users from score calculations, see the Exclude Specific Users from Score Calculations topic in the [Generate Relevancy and Age User Context Feeds for Workspace Smart Lists](#) section of the Implementing Sales guide.

Recommended Relevancy Score Calculation Settings

Specify how often the Smart Lists are refreshed by running the Generate Relevancy Feed:

- Set the ZCA_UC_FEED_TIMEFRAME profile option to **1**. Default value is 30.
Smart Lists display a maximum of 50 relevant records per business object. If your users process large amounts of data, limit the time period used to identify relevant data to 1 day. Data is renewed everyday to keep it relevant.
- Set the ZCA_UC_MAX_USERS_IN_CHILD_JOB profile option to **20**. Default value is 100.
Optimize performance by limiting the user records processed in a batch to 20. It improves processing so that users get relevant results faster and with greater efficiency.
- Set the Generate Relevancy Feed scheduled process frequency to **3 hours** to specify how often to run the process by which relevant data is identified and refreshed in smart lists.
- Set the Age User Context Relevancy Feed scheduled process frequency to **once daily** to specify how often to run the process by which aged data is identified and removed from smart lists.

Please contact Oracle Support if you require technical assistance.

RESOURCES

- [Generate Relevancy and Age User Context Feeds for Workspace Smart Lists](#) section in the Implementing Sales guide
- [Create and Manage Your Saved Searches in Workspace](#) section in the Using Sales guide
- [User Context Data Sources](#), [User Context Object Types](#), and [User Relevant Items](#) REST API for CX Sales and B2B Service
- [Get all user accounts](#) REST API for Oracle HCM Cloud

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