ORACLE® CRM On Demand

Oracle CRM On Demand Marketing Configuration Guide

Release 5.4.10

April 2013

Contents

Chapter 5:   Maintaining Oracle CRM On Demand Marketing

Index

1 **What's New in This Release**

What's New in Oracle CRM On Demand Marketing Configuration Guide, Release 5.4.10

Table 1 lists changes in this version of the documentation for Release 5.4.10.

Table 1.   What's New in Oracle CRM On Demand Marketing Configuration Guide, Release 5.4.10

Topic	Description
"Setting Up the Marketing Activity History Field" on page 24	Modified topic. Added information on creating the new field *On Demand Marketing Sourced*.

What's New in Oracle CRM On Demand Marketing Configuration Guide, Release 5.4.8, Revision A

Table 2 lists changes in this version of the documentation for Revision A of this guide.

Table 2.   What's New in Oracle CRM On Demand Marketing Configuration Guide, Revision A, Release 5.4.8

Topic	Description
"Process of Configuring Multiple Tenants" on page 28	Modified process. Moved some existing topics into this process.
"Setting Up the Lead Custom Field" on page 33	Moved topic. Moved this topic into the multiple tenant process.
"Setting Up the Contact Custom Field" on page 33	Moved topic. Moved this topic into the multiple tenant process.
"Setting Up the Campaign Custom Field" on page 34	Moved topic. Moved this topic into the multiple tenant process.
"Setting Up the Synchronization Filter" on page 34	Moved topic. Moved this topic into the multiple tenant process.
"Maintaining Oracle CRM On Demand Marketing" on page 37	New chapter. It describes how to maintain your instance.

Table 3 lists changes in this version of the documentation to support release 5.4.8 of the software.

Table 3.   What's New in Oracle CRM On Demand Marketing Configuration Guide, Release 5.4.8

Topic	Description
"About Configuring Oracle CRM On Demand and Oracle CRM On Demand Marketing" on page 8	Modified topic. Added information about custom roles.
"Requirements for Configuring Oracle CRM On Demand" on page 9	Modified topic. Removed requirement for a default language.
"Setting Up Users" on page 14	New topic. It describes how to add users.
"Synchronizing New Fields in Oracle CRM On Demand to Oracle CRM On Demand Marketing" on page 15	New topic. Added a topic on how to synchronize new fields.
"Setting Up a Web Services API Account in Oracle CRM On Demand Marketing" on page 18	Modified topic. Removed the requirement for a default language.
"Process of Configuring Marketing Activity Fields" on page 21	Modified topic. This task is no longer optional.
"Process of Configuring Marketing Activity History" on page 24	Modified topic. This task is no longer optional.
"Configuring Synchronization Fields" on page 27	New topic. Added a topic on how to configure synchronization fields.
"Process of Configuring Multiple Tenants" on page 30	New topic. It describes how to configure multiple tenants.
"Maintaining Oracle CRM On Demand Marketing" on page 37	New chapter. It describes how to maintain your instance.

2 Configuring Oracle CRM On Demand for Oracle CRM On Demand Marketing

This chapter describes how to configure Oracle CRM On Demand for use with Oracle CRM On Demand Marketing. It provides details of the page layouts and role settings that company administrators must set up to support Oracle CRM On Demand Marketing. It includes the following topics:

- "About Configuring the Domain Name Server" on page 7

- "About Configuring Oracle CRM On Demand and Oracle CRM On Demand Marketing" on page 8

- "Process of Configuring Oracle CRM On Demand for Oracle CRM On Demand Marketing" on page 9

NOTE: These procedures are for configuring for a single tenant environment. If you are configuring for multiple tenants, then you perform the following task: "Process of Configuring Multiple Tenants" on page 28.

About Configuring the Domain Name Server

Before configuring Oracle CRM On Demand Marketing, it is recommended that you set up a customized domain name server (DNS) and a subdomain name for your public-facing content, such as microsites, program landing pages, and Web forms. Each of these public-facing elements has a visible URL. It is recommended that your prospects, leads, and customers see a URL that is a part of your corporate domain.

As part of the provisioning process, Oracle Customer Care installs an SSL certificate for your subdomain and sends you a public IP address that is associated with it. Your company administrator must configure your DNS entry to associate the subdomain with the public IP address. For more information on submitting a DNS name for your account, contact Oracle Customer Care.

A subdomain that is customized for your company offers several advantages. Using a custom subdomain allows you to avoid sharing a subdomain with other Oracle customers, and makes your landing pages more secure. It is more intuitive for prospects, leads, and customers to access Oracle-hosted landing pages if the URL contains your corporate domain name. Customers will regard a recognizable domain as more trustworthy and therefore they will be more likely to interact with the site.

If you have multiple business units using a single Oracle CRM On Demand Marketing account, then it is recommended that you use a single subdomain (such as marketing.myexample.com) for all the business units.

If you have multiple business units using different Oracle CRM On Demand Marketing accounts, then it is recommended that you use a separate subdomain (such as marketing.myexample.com, products.mycompany.com, and so on) for each distinct Oracle CRM On Demand Marketing account.

CAUTION: If you do not properly configure your DNS settings and your microsites, then landing pages, and Web forms can not function. Even if you do not intend to use these public-facing content features, then other features, such as email tracking, depend upon the base URL to function properly.

If you intend to use a Canonical Name (CNAME) record to run multiple services from a single IP address, then your company administrator (rather than Oracle Customer Care) must create the CNAME record.

NOTE: Oracle CRM On Demand Marketing always uses the secure HTTP (HTTPS) protocol after your subdomain becomes active. Make sure that all the images on the landing pages or microsites that you host are also accessible by the HTTPS protocol.

About Configuring Oracle CRM On Demand and Oracle CRM On Demand Marketing

The integration between Oracle CRM On Demand and Oracle CRM On Demand Marketing is managed through fields on the user record and page layouts on user roles. Before you start to configure Oracle CRM On Demand for the integration, you must determine which users and which user roles will have access to Oracle CRM On Demand Marketing.

The integration between Oracle CRM On Demand Marketing and Oracle CRM On Demand works as follows:

■ To access Oracle CRM On Demand Marketing from Oracle CRM On Demand, users click a link in the Action bar.

 To support this functionality, you add a custom Web link field to the User object, and then create a custom Web applet in the Action bar that contains a link to Oracle CRM On Demand Marketing.

■ When a user in Oracle CRM On Demand first accesses Oracle CRM On Demand Marketing, the user is assigned a user role in Oracle CRM On Demand Marketing. There are three standard user roles in Oracle CRM On Demand Marketing:

  ■ Super user

  ■ Marketing user

  ■ Sales user

 To support this functionality, you create an Oracle CRM On Demand Marketing Role field and add it to the User Admin page layout, with a picklist entry for each of the Oracle CRM On Demand Marketing user roles. You then select the appropriate Oracle CRM On Demand Marketing user role on the user record of each user who will access Oracle CRM On Demand Marketing.

■ In addition to the three standard roles Oracle CRM On Demand Marketing supports custom roles. Custom roles must be added to the Marketing On Demand Role picklist.

■ A Web services API is used to integrate Oracle CRM On Demand Marketing with Oracle CRM On Demand.

   To support this functionality, you set up a Web services API account in Oracle CRM On Demand Marketing.

For more information about administering and using Oracle CRM On Demand, see *Oracle CRM On Demand Online Help*.

Process of Configuring Oracle CRM On Demand for Oracle CRM On Demand Marketing

To configure Oracle CRM On Demand for integration with Oracle CRM On Demand Marketing, perform the following tasks:

1 "Requirements for Configuring Oracle CRM On Demand" on page 9

2 "Setting Up Fields for Oracle CRM On Demand Marketing" on page 10

3 "Setting Up the Oracle CRM On Demand Marketing User Admin Layout" on page 11

4 "Assigning Oracle CRM On Demand Marketing Roles to Users" on page 13

5 "Configuring the Link to Oracle CRM On Demand Marketing" on page 13

6 "Setting Up Users" on page 14

Requirements for Configuring Oracle CRM On Demand

Before you begin the process of configuration, make sure that the following requirements are met:

■ Verify that your company profile in Oracle CRM On Demand has the following settings:

   ■ Default language is selected.

   ■ Web Services R16 Compatibility Mode is disabled.

      For more information on configuring your company profile, see *Oracle CRM On Demand Online Help.*

■ Verify that you have received an email from Oracle Customer Care, which indicates that you can begin configuration. This email contains the Oracle CRM On Demand Marketing host name and a service request (SR) number for the SR that covers the provisioning and configuration process.

■ Verify that in the profile of the user configuring Oracle CRM On Demand Marketing the Oracle CRM On Demand Role is Administrator.

This task is a step in "Process of Configuring Oracle CRM On Demand for Oracle CRM On Demand Marketing" on page 9.

Setting Up Fields for Oracle CRM On Demand Marketing

To set up the required fields to enable Oracle CRM On Demand Marketing to work with Oracle CRM On Demand, perform the following procedures:

■ "Setting Up the Oracle CRM On Demand Marketing Role Field" on page 10

■ "Setting Up the Oracle CRM On Demand Marketing Web Link Field" on page 11

This task is a step in "Process of Configuring Oracle CRM On Demand for Oracle CRM On Demand Marketing" on page 9.

Setting Up the Oracle CRM On Demand Marketing Role Field

To set up the Oracle CRM On Demand Marketing Role field, complete the steps in the following procedure.

To set up the Oracle CRM On Demand Marketing Role field

1 In the upper-right corner of any page, click the Admin global link.

2 In the Application Customization section, click Application Customization.

3 In the Record Type Setup section, click User.

4 In the Field Management section, click User Field Setup.

5 In the User Fields page, click New Field.

6 In the User Field Edit page, complete the following fields:

■ In the Display Name field, enter `Marketing On Demand Role`.

■ In the Field Type field, select Picklist.

7 Click Save.

8 In the User Fields page, click the Edit Picklist link for the field you created.

9 In the Edit Picklist window, enter the following case-sensitive values for the new field:

■ `Super User`

■ `Marketing User`

■ `Sales User`

While creating the values for the picklist, the default value *No Values* is saved as the ID for the first value regardless of the given value. There is no option to edit that ID value. Rename the first value to Unused and disable it. Configure the required three picklist values from fields 2, 3, and 4.

Make sure there are no other picklist values (that is, no empty value) other than the three mentioned previously.

10 Click Save & Close.

Setting Up the Oracle CRM On Demand Marketing Web Link Field

To set up the Oracle CRM On Demand Marketing Web link field, complete the steps in the following procedure.

To set up the Oracle CRM On Demand Marketing Web link field

1   In the upper-right corner of any page, click the Admin global link.

2   In the Application Customization section, click Application Customization.

3   In the Record Type Setup section, click User.

4   In the Field Management section, click User Field Setup.

5   In the User Fields page, click New Field.

6   In the User Field Edit page, complete the following fields:

   a   In the Display Name field, enter On Demand Marketing User Web Link.

   b   In the Field Type field, select Web Link.

7   Click Save.

8   In the User Fields page, click Edit Web Link for the field you created.

9   In the Edit Web Link window, enter the following values:

   a   In the Display Text field, enter `CRM On Demand Marketing`.

   b   In the Web Link Target field, select Open in New Window.

   c   In the Display Options field, select Both.

   d   In the Link Properties section of the Edit Web Link window, edit the URL as follows:

   `https://CRMOD Marketing Domain Name/caspiadmin/login.do?ajiv=%%%SSO Token%%%&userId=%%%User id%%%`

   where:

CRMOD Marketing Domain Name is the domain name provided by Oracle Customer Care. In this URL, make sure that there is a space between SSO and Token and also between User and id, as shown in the following example:

   `https://modprod.crmondemand.com/caspiadmin/login.do?ajiv=%%%SSO Token%%%&userId=%%%User id%%%`

10 Click Save.

Setting Up the Oracle CRM On Demand Marketing User Admin Layout

To set up the Oracle CRM On Demand Marketing User Admin Layout, complete the steps in the following procedure.

This task is a step in "Process of Configuring Oracle CRM On Demand for Oracle CRM On Demand Marketing" on page 9.

To set up the Oracle CRM On Demand Marketing User Admin Layout

1   In the upper-right corner of any page, click the Admin global link.

2   In the Application Customization section, click Application Customization.

3   In the Record Type Setup section, click User.

4   In the User Application Customization page, in the Page Layout Management section, click User Admin Page Layout.

5   In the User Admin Page Layout page, click the Copy link for the User Admin Page Standard Layout.

6   In Step 1 of the Page Layout Wizard:

   a   In the Layout Name field, enter `Oracle CRM On Demand Marketing User Admin Layout`.

   b   (Optional) In the Description field, enter a description of the page layout.

7   Go to Step 3 of the Page Layout Wizard, and move the Marketing On Demand Role field from the Available Fields section to the Key User Information section.

8   Click Finish to save the layout.

Assigning the Oracle CRM On Demand Marketing User Admin Layout to the Administrator Role

To assign the Oracle CRM On Demand Marketing User Admin Layout to the administrator role, complete the steps in the following procedure.

This task is a step in "Process of Configuring Oracle CRM On Demand for Oracle CRM On Demand Marketing" on page 9.

NOTE: The instructions in this procedure are based on the assumption that the user who sets up other users to work with Oracle CRM On Demand Marketing has the administrator role. If you want a user who has a different role to be able to set up users to work with Oracle CRM On Demand Marketing, assign the Oracle CRM On Demand Marketing User Admin Layout to that user's role.

To assign the Oracle CRM On Demand Marketing User Admin Layout to the administrator role

1   In the upper-right corner of any page, click the Admin global link.

2   In the User Management and Access Controls section, click User Management and Access Controls.

3   In the Role Management section, click Role Management.

4   In the Role List page, click the Edit link for the administrator role.

5 Go to Step 6 (Page Layout Assignment) of the Role Management Wizard.

6 In the Page Layout Name field for the User Admin page layout assignment, select Oracle CRM On Demand Marketing User Admin Layout.

7 Click Finish to save your changes.

Assigning Oracle CRM On Demand Marketing Roles to Users

Users in Oracle CRM On Demand who use Oracle CRM On Demand Marketing must have an Oracle CRM On Demand Marketing user role assigned to their user record. To assign an Oracle CRM On Demand Marketing role to a user, complete the steps in the following procedure.

This task is a step in "Process of Configuring Oracle CRM On Demand for Oracle CRM On Demand Marketing" on page 9.

To assign an Oracle CRM On Demand Marketing role to a user

1 In the upper-right corner of any page, click the Admin global link.

2 In the User Management and Access Controls section, click User Management and Access Controls.

3 In the User and Group Management section, click User Management.

4 In the record-level menu for the user, select Edit.

5 In the User Edit Page, in the Marketing On Demand Role field, select the appropriate role.

6 Click Save.

Configuring the Link to Oracle CRM On Demand Marketing

The Oracle CRM On Demand user must be able to access Oracle CRM On Demand Marketing with Single Sign-On (SSO) by clicking a link in Oracle CRM On Demand. The following procedure describes how to create a global Web applet that contains the Oracle CRM On Demand Marketing link. The applet is available in the Action bar.

To configure the link to Oracle CRM On Demand Marketing, complete the steps in the following procedure.

This task is a step in "Process of Configuring Oracle CRM On Demand for Oracle CRM On Demand Marketing" on page 9.

To create a global Web applet that contains the Oracle CRM On Demand Marketing HTML link

1 In the upper-right corner of any page, click the Admin global link.

2 In the Application Customization section, click Application Customization.

3 In the Application Setup section, click Global Web Applets.

4 In the My Applet List, click New.

5 On the My Web Applet page, enter *On Demand Marketing* in the Name field.

6 For the Location, choose Action Bar.

7 For the Type, choose HTML.

8 Enter the following string in the Web Applet HTML field:

```
<a id="modSsoLink" href="http://CRMOD Server Host Name/OnDemand/
SSOWebLink?WebLink.Object=User&WebLink.Ctrl=WEBLINK_000" target="new">On Demand
Marketing####</a>
```

where:

CRMOD Server Host Name is the Oracle CRM On Demand domain name from the URL that you use to access Oracle CRM On Demand.
is your Oracle CRM On Demand Marketing instance name.

For example:

```
<a id="modSsoLink" href="https://secure-ausomxala.crmondemand.com/OnDemand/
SSOWebLink?WebLink.Object=User&WebLink.Ctrl=WEBLINK_000" target="new">On Demand
MarketingACMEINC_US</a>
```

NOTE: If there is only one Web link field on the user object, use WEBLINK_000 for the Web link value in the string. If you already have one or more Web link fields on the user object, change the number by the appropriate increment to distinguish it from the existing fields, for example, WEBLINK_001. Because you have more than one web links for each instance of Oracle CRM On Demand Marketing, increment the number for each instance. For example if you start with WEBLINK_000, the next one is WEBLINK_001.

9 For the Height, enter a value of 20 pixels.

10 Click Save.

Users can add the Oracle CRM On Demand Marketing Web applet to their Action bar layout. For more information on changing the action bar layout, see *Oracle CRM On Demand Online Help*.

Setting Up Users

Depending on your license, you might want to give Oracle CRM On Demand Marketing access to additional users. You must set up new users in Oracle CRM On Demand. You must be familiar with adding users to Oracle CRM On Demand. For more information, see *Oracle CRM On Demand Online Help*. The following procedure covers specific additions to the procedure in *Oracle CRM On Demand Online Help*.

This task is a step in "Process of Configuring Oracle CRM On Demand for Oracle CRM On Demand Marketing" on page 9.

To set up a user for Oracle CRM On Demand Marketing

1 In Oracle CRM On Demand, click Admin, User Management and Access Controls, and then User Management.

2 Set up a new user in Oracle CRM On Demand.

In the User Profile, there is a field for Marketing On Demand Role. The picklist displays a list of available roles. There are three standard roles: Super User, Marketing User, and Sales user. You can also have custom roles.

3 Assign a role to the user.

4 Complete the remaining fields as usual.

Each user must complete the remaining steps.

5 In Oracle CRM On Demand, click My Setup, Personal Layout, and then Action Bar Layout.

6 Add the section for the On Demand Marketing Web link, to the Action Bar Layout.

3 Configuring Oracle CRM On Demand Marketing for Data Integration

This chapter describes how to configure Oracle CRM On Demand Marketing for data integration with Oracle CRM On Demand. It includes the following topic:

■ "Process of Configuring Oracle CRM On Demand Marketing" on page 17

Process of Configuring Oracle CRM On Demand Marketing

To configure Oracle CRM On Demand Marketing for data integration with Oracle CRM On Demand, perform the following tasks:

1 "Configuring Language Settings" on page 17

2 "Configuring Object Synchronization Settings" on page 18

3 "Setting Up a Web Services API Account in Oracle CRM On Demand Marketing" on page 18

4 "Confirming Attribute Metadata Synchronization" on page 19

5 "Notifying Oracle Customer Care That the Configuration Is Complete" on page 19

6 "Tracking the Status of the Initial Synchronization Job" on page 19

Configuring Language Settings

To configure language settings in Oracle CRM On Demand Marketing, complete the steps in the following procedure.

This task is a step in "Process of Configuring Oracle CRM On Demand Marketing" on page 17.

To configure language settings

1 Click the Oracle CRM On Demand Marketing Web applet URL link.

2 In the Oracle CRM On Demand Marketing home page, click the Admin global link.

3 In the CRM Integration Management section, click Language Selections.

4 Select the Active check box for each language that you want to use in Oracle CRM On Demand Marketing.

Configuring Object Synchronization Settings

To configure object synchronization settings in Oracle CRM On Demand Marketing, complete the steps in the following procedure.

This task is a step in "Process of Configuring Oracle CRM On Demand Marketing" on page 17.

To configure object synchronization settings

1 Click the Oracle CRM On Demand Marketing Web applet URL link.

2 In the Oracle CRM On Demand Marketing home page, click the Admin global link.

3 In the CRM Integration Management section, click Object Sync Configuration.

4 Select the check box for each object type that you want to synchronize between Oracle CRM On Demand and Oracle CRM On Demand Marketing.

Setting Up a Web Services API Account in Oracle CRM On Demand Marketing

To set up the Web services API account in Oracle CRM On Demand Marketing, complete the steps in the following procedure.

This task is a step in "Process of Configuring Oracle CRM On Demand Marketing" on page 17.

To set up a Web services API account in Oracle CRM On Demand Marketing

1 Verify that in the profile of the Web services API user the Oracle CRM On Demand Role is Administrator.

2 Click the Oracle CRM On Demand Marketing Web applet URL link.

3 In the Oracle CRM On Demand Marketing home page, click the Admin global link.

4 In the CRM Integration Management section, click Account Credentials.

5 In the User Sign In ID field, enter the User Sign In ID of the user, in the format *company/user,* as recorded on the user's record in Oracle CRM On Demand. For example:

```
ACMEINC/JBROWN
```

NOTE: Oracle CRM On Demand Marketing will assign this user for Web services API calls. The user must have the appropriate privilege in the user role in Oracle CRM On Demand to allow the use of Web services. For more information, see *Oracle Web Services On Demand Guide*, available on Oracle Technology Network (http://www.oracle.com/technetwork/indexes/documentation/index.html) and Oracle E-Delivery. It might also be installed locally on your intranet or on a network location.

6 Enter the password, and click Save.

Confirming Attribute Metadata Synchronization

To confirm that the Attribute Metadata Synchronization job has completed successfully, complete the steps in the following procedure.

This task is a step in .

To confirm that the Attribute Metadata Synchronization job is complete

1   Click the Oracle CRM On Demand Marketing Web applet URL link.

2   In the Oracle CRM On Demand Marketing home page, click the Admin global link.

3   In the Job Reports section, click Job Status.

4   Verify that CRM Attribute Metadata Sync (One Time Job) shows a status of Success.

NOTE: The Attribute Metadata Synchronization job might take several minutes to finish.

After the Attribute Metadata Synchronization job is complete, you can optionally customize attribute mappings for campaigns, accounts, contacts, or leads according to your business requirements.

If you choose to configure contact and lead synchronization filters, then you must update the provisioning service request to notify Oracle Customer Care to activate them. Oracle Customer Care activates the filters before running the initial synchronization of the data. For details about configuring contact and lead synchronization filters, see *Oracle CRM On Demand Marketing Online Help*.

Notifying Oracle Customer Care That the Configuration Is Complete

To notify Oracle Customer Care that the configuration is complete, complete the steps in the following procedure.

This task is a step in .

To notify Oracle Customer Care that the configuration is complete

■   Update the service request that you received from Oracle Customer Care.

This step automatically sends an email to the Oracle Customer Care team to inform them that the service request has been updated.

Tracking the Status of the Initial Synchronization Job

After you update the service request to indicate to Oracle Customer Care that the configuration is complete, Oracle Customer Care schedules an Initial Data Synchronization Job to synchronize data for all the enabled objects from Oracle CRM On Demand to Oracle CRM On Demand Marketing. This initial synchronization can take time to complete if there is a huge volume of data to be synchronized. You can track the status of the initial synchronization job by completing the following procedure.

This task is a step in .

To track the status of the initial synchronization job

1 Click the Oracle CRM On Demand Marketing Web applet URL link.

2 In the Oracle CRM On Demand Marketing home page, click the Admin global link.

3 In the Job Reports section, click Job Status.

4 Review the status of the CRM On Demand Initial Object Data Sync Job.

NOTE: After the initial synchronization completes, Oracle Customer Care closes the service request. In the meantime, you can start using the Oracle CRM On Demand Marketing application and work on the administration setup of other areas of the application.

4 Configuring User Interface Integration with Oracle CRM On Demand

This chapter describes the steps for configuring user interface integration between Oracle CRM On Demand Marketing and Oracle CRM On Demand. It includes the following topics:

■ "Process of Configuring Marketing Activity Fields" on page 21

■ "Process of Configuring Marketing Activity History" on page 24

■ "Process of Configuring Multiple Tenants" on page 28

NOTE: These instructions are for configuring for a single tenant environment. If you are configuring for multiple tenants, you must first read the instructions in "Process of Configuring Multiple Tenants" on page 28.

Process of Configuring Marketing Activity Fields

Oracle CRM On Demand Marketing displays marketing activity details when users click a link in the Task Detail page in Oracle CRM On Demand.

To support this functionality, you create two marketing activity fields, one of which is a Web link. You then add the Web link field to a custom layout for the Task Detail page, and assign the custom layout to each user role that will access Oracle CRM On Demand Marketing.

To configure the Oracle CRM On Demand Marketing user interface to display additional marketing activity fields, perform the following procedures:

1 "Setting Up the Marketing Activity Fields" on page 21

2 "Setting Up the Oracle CRM On Demand Marketing Activity Layout" on page 23

3 "Assigning the Oracle CRM On Demand Marketing Activity Layout to User Roles" on page 23

Setting Up the Marketing Activity Fields

A new custom field needs to be created for the activity object. To set up the marketing activity fields, complete the steps in the following procedure.

NOTE: The Marketing Activity Identifier field must be hidden in the user interface. Do not add this field to any user page layout. The Marketing Activity Identifier field is updated by Oracle CRM On Demand Marketing when a marketing activity is published to Oracle CRM On Demand.

This task is a step in "Process of Configuring Marketing Activity Fields" on page 21.

To set up the marketing activity fields

1 In the upper-right corner of any page, click the Admin global link.

2 In the Application Customization section, click Application Customization.

3 In the Record Type Setup section, click Activity.

4 In the Field Management section, click Activity Field Setup.

5 In the Activity Fields page, click New Field.

6 In the Activity Field page, complete the following fields:

   a In the Display Name field, enter `Marketing Activity Identifier`.

   b In the Field Type field, select Text (Long).

7 Click Save.

8 In the Activity Fields page, click New Field.

9 In the Activity Field page, complete the following fields:

   a In the Field Name field, enter `Marketing Activity Details`.

   b In the Field Type field, select Web Link.

10 Click Save.

11 In the Activity Fields page, click Edit Web Link for the Marketing Activity Identifier field that you created.

12 In the Window Properties section of the Edit Web Link window, set the following properties:

   a In the Display Text field, enter `Marketing Activity Details`.

   b In the Web Link Target field, select Open in New window.

   c In the Display Options field, select Both.

13 In the Link Properties section of the Edit Web Link window, edit the URL as follows:

   `https://`*CRMOD Marketing Domain Name*`/caspiadmin/login.do?ajiv=%%%SSO Token%%%`
   `&userId=%%%User id%%%&home=%%%ltMarketing_Activity_Identifier%%%`

where:

   CRMOD Marketing Domain Name is the domain name provided by Oracle Customer Care.

Make sure the URL in this step contains valid field names for SSO Token, User Id, and Marketing Activity Identifier. These field name values are visible in the User Fields and Activity Fields picklists on the current screen. In this URL, make sure that there is a space between `SSO` and `Token` and also between `User` and `id`, as shown in the following example:

   `https://modprod.crmondemand.com/caspiadmin/login.do?ajiv=%%%SSO`
   `Token%%%&userId=%%%User id%%%&home=%%%ltMarketing_Activity_Identifier%%%`

14 Click Save to save your changes and close the Edit Web Link window.

Setting Up the Oracle CRM On Demand Marketing Activity Layout

To set up the Oracle CRM On Demand Marketing Activity Layout, complete the steps in the following procedure.

This task is a step in .

To set up the Oracle CRM On Demand Marketing Activity Layout

1   In the upper-right corner of any page, click the Admin global link.

2   In the Application Customization section, click Application Customization.

3   In the Record Type Setup section, click Activity.

4   In the Activity Application Customization page, in the Page Layout Management section, click Task Page Layout.

5   In the Task Page Layout page, click the Copy link for the Task Page Standard Layout.

6   In Step 1 of the Page Layout Wizard, do the following:

   a   In the Layout Name field, enter Oracle CRM On Demand Marketing `Activity Layout.`

   b   (Optional) In the Description field, enter a description of the page layout.

7   Go to Step 3 (Field Layout) of the Page Layout Wizard, and move the Marketing Activity Details field from the Available Fields section to the Key Task Information section.

8   Click Finish to save the layout.

Assigning the Oracle CRM On Demand Marketing Activity Layout to User Roles

You assign the Oracle CRM On Demand Marketing Activity Layout to the administrator role and to any other roles that will use Oracle CRM On Demand Marketing.

To assign the Oracle CRM On Demand Marketing Activity Layout to a user role, complete the steps in the following procedure.

This task is a step in .

To assign the Oracle CRM On Demand Marketing Activity Layout to a user role

1   In the upper-right corner of any page, click the Admin global link.

2   In the User Management and Access Controls section, click User Management and Access Controls.

3   In the Role Management section, click Role Management.

4   In the Role List page, click the Edit link for the role where you want to assign the Oracle CRM On Demand Marketing Activity Layout.

5 Go to Step 6 (Page Layout Assignment) of the Role Management Wizard.

6 In the Page Layout Name field for the Task page layout assignment, select Oracle CRM On Demand Marketing Activity Layout.

7 Click Finish to save your changes.

8 (Optional) Repeat this procedure for other roles if necessary.

Process of Configuring Marketing Activity History

Users can view the marketing activity history of a lead or contact in the Marketing History Details screen by clicking a link in the Lead Details or Contact Details pages. You must create a new custom field on the Lead and Contact objects.

To configure marketing activity history, perform the following tasks:

1 "Setting Up the Marketing Activity History Field" on page 24

2 "Setting Up the Oracle CRM On Demand Marketing Activity History Layout" on page 26

3 "Assigning the Marketing Activity History Layout to User Roles" on page 27

Setting Up the Marketing Activity History Field

To set up the marketing activity history field, complete the steps in the following procedures.

This task is a step in "Process of Configuring Marketing Activity History" on page 24.

To set up the marketing activity history field on the Contact object

1 In the upper-right corner of any page, click the Admin global link.

2 In the Application Customization section, click Application Customization.

3 In the Record Type Setup section, click Contact.

4 In the Field Management section, click Contact Field Setup.

5 In the Contact Fields page, click New Field.

6 In the Contact Field Edit page, complete the following fields:

    a In the Display Name field, enter `Marketing Activity History`.

    b In the Field Type field, select Web Link.

7 Click Save.

8 In the Contact Fields page, click Edit Web Link for the Marketing Activity History field that you created.

9 In the Edit Web Link window, enter the following values:

a In the Display Text field, enter *On Demand Marketing*.

b In the Web Link Target field, select Open in New window.

c In the Display Options field, select Both.

10 In the Link Properties section of the Edit Web Link window, edit the URL as follows:

```
https://CRMOD Marketing Domain Name/caspiadmin/login.do?ajiv=%%%SSO Token%%%
&userId=%%%User id%%%
&home=%2fmarketingActivity.do%3fsubAction%3dcah%26cxi%3d%%%Integration_Id%%%
```

where:

CRMOD Marketing Domain Name is the domain name provided by Oracle Customer Care. In
this URL, make sure that there is a space between SSO and Token and also between User and
id, as shown in the following example:

```
https://modprod.crmondemand.com/caspiadmin/login.do?ajiv=%%%SSO Token%%%
&userId=%%%User id%%%
&home=%2fmarketingActivity.do%3fsubAction%3dcah%26cxi%3d%%%Integration_Id%%%
```

11 Click Save to save your changes and close the Edit Web Link window.

To set up the marketing activity history field on the lead object, complete the steps in the following
procedure.

To set up the marketing activity history field on the Lead object

1 In the upper-right corner of any page, click the Admin global link.

2 In the Application Customization section, click Application Customization.

3 In the Record Type Setup section, click Lead.

4 In the Field Management section, click Lead Field Setup.

5 In the Lead Fields page, click New Field.

6 In the Lead Field Edit page, complete the following fields:

a In the Display Name field, enter *Marketing Activity History*.

b In the Field Type field, select Web Link.

7 Click Save.

8 In the Leads Fields page, click Edit Web Link for the Marketing History Activity field that you
created.

9 In the Edit Web Link window, enter the following values:

a In the Display Text field, enter *On Demand Marketing*.

b In the Web Link Target field, select Open in New window.

c In the Display Options field, select Both.

10 In the Link Properties section of the Edit Web Link window, edit the URL as follows:

```
https://CRMOD Marketing Domain Name/caspiadmin/login.do?ajiv=%%%SSO Token%%%
&userId=%%%User id%%%
&home=%2fmarketingActivity.do%3fsubAction%3dcah%26cxi%3d%%%Integration_Id%%%
```

where:

CRMOD Marketing Domain Name is the domain name provided by Oracle Customer Care. In
this URL, make sure that there is a space between SSO and Token and also between User and
id, as shown in the following example:

```
https://modprod.crmondemand.com/caspiadmin/login.do?ajiv=%%%SSO Token%%%
&userId=%%%User id%%%
&home=%2fmarketingActivity.do%3fsubAction%3dcah%26cxi%3d%%%Integration_Id%%%
```

11 Click Save to save your changes and close the Edit Web Link window.

12 In the Lead Field Edit page, click New Field and then complete the following fields:

   a In the Display Name field, enter *On Demand Marketing Sourced*.

   b In the Field Type field, select Checkbox.

13 Click Save.

Setting Up the Oracle CRM On Demand Marketing Activity History Layout

To set up the Oracle CRM On Demand Marketing Activity History Layout, complete the steps in the
following procedure.

This task is a step in "Process of Configuring Marketing Activity History" on page 24.

*To set up the Oracle CRM On Demand Marketing Activity History Layout for the
Contacts Page*

1 In the upper-right corner of any page, click the Admin global link.

2 In the Application Customization section, click Application Customization.

3 In the Record Type Setup section, click Contact.

4 In the Activity Application Customization page, in the Page Layout Management section, click
Contact Page Layout.

5 In the Contact Page Layout page, click the Copy link for the Contact Page Standard Layout.

6 In Step 1 of the Page Layout Wizard:

   a In the Layout Name field, enter *Oracle CRM On Demand Marketing Activity Layout*.

   b (Optional) In the Description field, enter a description of the page layout.

7 Go to Step 3 (Field Layout) of the Page Layout Wizard, and move the Marketing Activity History
field from the Available Fields section to the Key User Information section.

8 Click Finish to save the layout.

***To set up the Oracle CRM On Demand Marketing Activity History Layout for the Leads
Page***

1 In the upper-right corner of any page, click the Admin global link.

2 In the Application Customization section, click Application Customization.

3 In the Record Type Setup section, click Lead.

4 In the Activity Application Customization page, in the Page Layout Management section, click
Lead Page Layout.

5 In the Lead Page Layout page, click the Copy link for the Lead Page Standard Layout.

6 In Step 1 of the Page Layout Wizard:

    a In the Layout Name field, enter *Oracle CRM On Demand Marketing Activity Layout*.

    b (Optional) In the Description field, enter a description of the page layout.

7 Go to Step 3 (Field Layout) of the Page Layout Wizard, and move the Marketing Activity History
field from the Available Fields section to the Key User Information section.

8 Click Finish to save the layout.

Assigning the Marketing Activity History Layout to User Roles

You assign the Marketing Activity History Layout to the administrator role and to any other roles that
use Oracle CRM On Demand Marketing.

To assign the Marketing Activity History Layout to a user role, complete the steps in the following
procedure.

This task is a step in .

To assign the Marketing Activity Layout to a user role

1 In the upper-right corner of any page, click the Admin global link.

2 In the User Management and Access Controls section, click User Management and Access
Controls.

3 In the Role Management section, click Role Management.

4 In the Role List page, click the Edit link for the role where you want to assign the Marketing
Activity History Layout.

5 Go to Step 6 (Page Layout Assignment) of the Role Management Wizard.

6 In the Page Layout Name field, select Lead Layout or Contact Layout, as appropriate.

7 Click Finish to save your changes.

(Optional) Repeat this procedure for other roles if necessary.

Process of Configuring Multiple Tenants

If you want to configure multiple tenants, then you must follow the steps covered previously in this guide. The only changes to perform for multiple tenant configuration are described in the following:

■ "Changing the Oracle CRM On Demand Marketing Web Link Field" on page 28

■ "Changing the Link to Oracle CRM On Demand Marketing" on page 29

■ "Changing the Marketing Activity Fields" on page 29

■ "Changing the Marketing Activity History Field for the Contact Object" on page 30

■ "Changing the Marketing Activity History Field for the Lead Object" on page 31

■ "Changing the Marketing Activity History Layout for the Contact Object" on page 32

■ "Changing the Marketing Activity History Layout for the Lead Object" on page 32

■ "Setting Up the Lead Custom Field" on page 33

■ "Setting Up the Contact Custom Field" on page 33

■ "Setting Up the Campaign Custom Field" on page 34

■ "Setting Up the Synchronization Filter" on page 34

Changing the Oracle CRM On Demand Marketing Web Link Field

The original topic is "Setting Up the Oracle CRM On Demand Marketing Web Link Field" on page 11.

This task is a step in "Process of Configuring Multiple Tenants" on page 28.

Repeat the procedure for each Oracle CRM On Demand Marketing tenant you are configuring to work with Oracle CRM On Demand. While repeating the procedure, use the following changes.

To change the Oracle CRM On Demand Marketing Web link field

1 In the step where you create the Display Name field, use the following instructions:

In the Display Name field, enter `On Demand Marketing User Web Link ####`.
Replace #### with unique text for each Oracle CRM On Demand Marketing tenant that you are configuring to work with Oracle CRM On Demand.

2 In the step where you define the link properties, use the following instructions:

In the Link Properties section of the Edit Web Link window, edit the URL as follows:

```
https://CRMOD Marketing Domain Name/caspiadmin/login.do?ajiv=%%%SSO Token%%%
&userId=%%%User id%%%%%&ODMTenantName=Your ODM Tenant Name
```

where:

CRMOD Marketing Domain Name is the domain name provided by Oracle Customer Care. Your
ODM Tenant Name is the ODM tenant name provided by Oracle Customer Care. In this URL,
make sure that there is a space between SSO and Token and also between User and id, as
shown in the following example:

```
https://modprod.crmondemand.com/caspiadmin/login.do?ajiv=%%%SSO Token%%%
&userId=%%%User id%%%%%&ODMTenantName=ACMEINC_US
```

Changing the Link to Oracle CRM On Demand Marketing

The original topic is "Configuring the Link to Oracle CRM On Demand Marketing" on page 13.

This task is a step in "Process of Configuring Multiple Tenants" on page 28.

Repeat the procedure for each Oracle CRM On Demand Marketing tenant you are configuring to work
with Oracle CRM On Demand. While repeating the procedure, use the following changes:

To change the link to Oracle CRM On Demand Marketing

■   In the step where you define the Name field in the My Web Applet page, use the following
instructions:

On the My Web Applet page, enter `On Demand Marketing ####` in the Name field.
Replace #### with unique text for each Oracle CRM On Demand Marketing tenant you are
configuring to work with Oracle CRM On Demand. For example: On Demand Marketing ACMEINC_US.

Changing the Marketing Activity Fields

The original topic is "Setting Up the Marketing Activity Fields" on page 21.

This task is a step in "Process of Configuring Multiple Tenants" on page 28.

To update the marketing activity fields for multiple tenants

1   Complete the steps for adding the Marketing Activity Identifier field, but do not continue to the
steps for adding the Marketing Activity Details field.

2   In the Activity Fields page, click New Field.

3   In the Activity Field page, complete the following fields:

    a   In the Display Name field, enter *ODM Tenant Name*.

    b   In the Field Type field, select Text.

4   Click Save.

5   Continue with the existing steps for adding the Marketing Activity Details field.

6   Replace the step for defining the link properties with the following step.

In the Link Properties section of the Edit Web Link window, edit the URL as follows:

```
https://CRMOD Marketing Domain Name/caspiadmin/login.do?ajiv=%%%SSO Token%%%
&userId=%%%User id%%%&home=%%%ltMarketing_Activity_Identifier%%%
&ODMTenantName=%%%ltODM_Tenant_Name%%%
```

where:

CRMOD Marketing Domain Name is the domain name provided by Oracle Customer Care.

Make sure the URL in this step contains valid field names for SSO Token, User Id, and Marketing
Activity Identifier. These field name values are visible in the User Fields and Activity Fields
picklists on the current screen. In this URL, make sure that there is a space between `SSO` and
`Token` and also between `User` and `id`, as shown in the following example:

```
https://modprod.crmondemand.com/caspiadmin/login.do?ajiv=%%%SSO
Token%%%&userId=%%%User id%%%&home=%%%ltMarketing_Activity_Identifier%%%
&ODMTenantName=%%%ltODM_Tenant_Name%%%
```

Changing the Marketing Activity History Field for the Contact Object

The original topic is "To set up the marketing activity history field on the Contact object" on page 24.

This task is a step in "Process of Configuring Multiple Tenants" on page 28.

Repeat this procedure for each Oracle CRM On Demand Marketing tenant you are configuring to work
with Oracle CRM On Demand. While repeating the procedure, use the following changes.

To change the marketing activity history field for the contact object

1   Replace the step for the Edit Web Link window with the next step.

2   In the Edit Web Link window, enter the following values:

a   In the Display Text field, enter *ODM ### Activities*.
Replace ### with the Oracle CRM On Demand Marketing instance associated with the link, for
example: ODM ACMEINC_US Activities. This is required to make the field name unique. You can
use another naming convention of your choice.

b   In the Web Link Target field, select Open in New window.

c   In the Display Options field, select Both.

3   Replace the step for the link properties with this step:

In the Link Properties section of the Edit Web Link window, edit the URL as follows:

```
https://CRMOD Marketing Domain Name/caspiadmin/login.do?ajiv=%%%SSO Token%%%
&userId=%%%User id%%%
&home=%2fmarketingActivity.do%3fsubAction%3dcah%26cxi%3d%%%Integration_Id%%%
&ODMTenantName=Your_ODM_Tenant_Name
```

where:

CRMOD Marketing Domain Name is the domain name provided by Oracle Customer Care.
Your_ODM_Tenant_Name is the ODM tenant name provided by Oracle Customer Care.
In this URL, make sure that there is a space between SSO and Token and also between User
and id, as shown in the following example:

```
https://modprod.crmondemand.com/caspiadmin/login.do?ajiv=%%%SSO Token%%%
&userId=%%%User id%%%
&home=%2fmarketingActivity.do%3fsubAction%3dcah%26cxi%3d%%%Integration_Id%%%
&ODMTenantName=ACMEINC_US
```

Changing the Marketing Activity History Field for the Lead Object

The original topic is "To set up the marketing activity history field on the Lead object" on page 25.

This task is a step in "Process of Configuring Multiple Tenants" on page 28.

Repeat this procedure for each Oracle CRM On Demand Marketing tenant you are configuring to work
with Oracle CRM On Demand. While repeating the procedure, use the following changes.

To change the marketing activity history field for the lead object

1 Replace the step for the Edit Web Link window with the next step.

2 In the Edit Web Link window, enter the following values:

    a In the Display Text field, enter *ODM ### Activities*.
       Replace ### with the Oracle CRM On Demand Marketing instance associated with the link, for
       example: ODM ACMEINC_US Activities. This is required to make the field name unique. You can
       use another naming convention of your choice.

    b In the Web Link Target field, select Open in New window.

    c In the Display Options field, select Both.

3 Replace the step for the link properties with this step:

In the Link Properties section of the Edit Web Link window, edit the URL as follows:

```
https://CRMOD Marketing Domain Name/caspiadmin/login.do?ajiv=%%%SSO Token%%%
&userId=%%%User id%%%
&home=%2fmarketingActivity.do%3fsubAction%3dcah%26cxi%3d%%%Integration_Id%%%
&ODMTenantName=Your_ODM_Tenant_Name
```

where:

CRMOD Marketing Domain Name is the domain name provided by Oracle Customer Care.
Your_ODM_Tenant_Name is the ODM tenant name provided by Oracle Customer Care.
In this URL, make sure that there is a space between SSO and Token and also between User and id, as shown in the following example:

```
https://modprod.crmondemand.com/caspiadmin/login.do?ajiv=%%%SSO Token%%%
&userId=%%%User id%%%
&home=%2fmarketingActivity.do%3fsubAction%3dcah%26cxi%3d%%%Integration_Id%%%
&ODMTenantName=ACMEINC_US
```

Changing the Marketing Activity History Layout for the Contact Object

The original topic is "To set up the Oracle CRM On Demand Marketing Activity History Layout for the Contacts Page" on page 26.

This task is a step in "Process of Configuring Multiple Tenants" on page 28.

Repeat this procedure for each Oracle CRM On Demand Marketing tenant you are configuring to work with Oracle CRM On Demand. While repeating the procedure, use the following changes.

To change the marketing activity history layout for the contact object

1   Replace the step for the Page Layout Wizard with the following step.

2   In Step 1 of the Page Layout Wizard:

   a   In the Layout Name field, enter *Oracle CRM On Demand Marketing Activity Layout for ###*. Replace ### with the Oracle CRM On Demand Marketing instance associated with the link, for example: Oracle CRM On Demand Marketing Activity Layout for ACMEINC_US. This is required to make the field name unique. You can use another naming convention of your choice.

   b   (Optional) In the Description field, enter a description of the page layout.

Changing the Marketing Activity History Layout for the Lead Object

The original topic is "To set up the Oracle CRM On Demand Marketing Activity History Layout for the Leads Page" on page 27.

This task is a step in "Process of Configuring Multiple Tenants" on page 28.

Repeat this procedure for each Oracle CRM On Demand Marketing tenant you are configuring to work with Oracle CRM On Demand. While repeating the procedure, use the following changes.

To change the marketing activity history layout for the lead object

1   Replace the step for the Page Layout Wizard with the following step.

2   In Step 1 of the Page Layout Wizard:

   a   In the Layout Name field, enter *Oracle CRM On Demand Marketing Activity Layout for ###*. Replace ### with the Oracle CRM On Demand Marketing instance associated with the link, for example: Oracle CRM On Demand Marketing Activity Layout for ACMEINC_US. This is required to make the field name unique. You can use another naming convention of your choice.

   b   (Optional) In the Description field, enter a description of the page layout.

Setting Up the Lead Custom Field

You must create a new custom field for the lead object.

This task is a step in "Process of Configuring Multiple Tenants" on page 28.

To set up the lead custom field

1   In the upper-right corner of any page, click the Admin global link.

2   In the Application Customization section, click Application Customization.

3   In the Record Type Setup section, click Lead.

4   In the Field Management section, click Lead Field Setup.

5   In the Lead Fields page, click New Field.

6   In the Lead Field page, complete the following fields:

   ■   In the Display Name field, enter *Created By ODM Tenant Name*.

   ■   In the Field Type field, select Text.

7   Click Save.

8   In the Lead Fields page, click New Field.

9   In the Lead Field page, complete the following fields:

   ■   In the Display Name field, enter *Last Modified By ODM Tenant Name*.

   ■   In the Field Type field, select Text.

10 Click Save.

Setting Up the Contact Custom Field

You must create a new custom field for the contact object.

This task is a step in "Process of Configuring Multiple Tenants" on page 28.

To set up the contact custom field

1 In the upper-right corner of any page, click the Admin global link.

2 In the Application Customization section, click Application Customization.

3 In the Record Type Setup section, click Contact.

4 In the Field Management section, click Contact Field Setup.

5 In the Contact Fields page, click New Field.

6 In the Contact Field page, complete the following fields:

■ In the Display Name field, enter *Last Modified By ODM Tenant Name*.

■ In the Field Type field, select Text.

7 Click Save.

Setting Up the Campaign Custom Field

You must create a new custom field for the campaign object.

This task is a step in "Process of Configuring Multiple Tenants" on page 28.

To set up the campaign custom field

1 In the upper-right corner of any page, click the Admin global link.

2 In the Application Customization section, click Application Customization.

3 In the Record Type Setup section, click Campaign.

4 In the Field Management section, click Campaign Field Setup.

5 In the Campaign Fields page, click New Field.

6 In the Campaign Field page, complete the following fields:

■ In the Display Name field, enter *ODM Tenant Name*.

■ In the Field Type field, select Text.

7 Click Save.

Setting Up the Synchronization Filter

To set up the Oracle CRM On Demand Marketing Activity History Layout, complete the steps in the
following procedure.

This task is a step in "Process of Configuring Multiple Tenants" on page 28.

To set up the synchronization filter

1   Log in to your Oracle CRM On Demand Marketing tenant.

2   Navigate to Admin and then Object Synch Configuration.

3   For the Contact object, click the Configure Filter link.

4   In the Contact Synchronization Filter screen, click Configure.

5   Configure the filter as required.

   NOTE: You can create only one filter condition.

   The following set of attributes is available for configuration: Contact Type, Country, Is Email
   Permitted, Segment, Tier, Indexed Checkbox, and Indexed Picklist 1 through 6.

6   Click Save.

7   Navigate to Admin, and then Object Synch Configuration.

8   For the Lead object, click the Configure Filter link.

9   In the Lead Synchronization Filter screen, click Configure.

10 Configure the filter as required.

   NOTE: You can create only one filter condition.

   The following set of attributes is available for configuration: Lead Type, Country, Product
   Interest, Is Email Permitted, and Indexed Picklist 1 through 6.

11 Click Save.

5 Maintaining Oracle CRM On Demand Marketing

This chapter describes how to maintain your Oracle CRM On Demand Marketing instance. It includes the following topic:

■ "Synchronizing New Fields in Oracle CRM On Demand with Oracle CRM On Demand Marketing"

Synchronizing New Fields in Oracle CRM On Demand with Oracle CRM On Demand Marketing

When you add new fields in Oracle CRM On Demand, you must use the following procedure to make sure the new fields synchronize properly with Oracle CRM On Demand Marketing. If the attribute metadata synchronization job does not run prior to the entity data synchronization job, then the values for the new fields do not appear in the user interface.

To synchronize new fields

1 Create one or more new fields in Oracle CRM On Demand.

   The CRMOD_ATTRIBUTE_METADATA_SYNC_JOB creates and updates the corresponding fields in Oracle CRM On Demand Marketing and manages the automatic mapping.

2 Check that the CRMOD_ATTRIBUTE_METADATA_SYNC_JOB has completed successfully and perform the following steps:

   a In Oracle CRM On Demand Marketing, navigate to Admin, and then Job Status.

   b Select the Is Recurring Job check box.

   c In the Job Name menu, choose CRMOD_ATTRIBUTE_METADATA_SYNC_JOB.

   d Click Search.

   e Check the date and time status to see whether the run has completed after you created the new fields.

3 Import data from Oracle CRM On Demand into Oracle CRM On Demand Marketing.

   The CRMOD_ENTITY_DATA_SYNC job synchronizes the update data from Oracle CRM On Demand to Oracle CRM On Demand Marketing. It imports only data for mapped fields.

4 Check that the CRMOD_ENTITY_DATA_SYNC job has completed successfully and perform the following steps:

   a In Oracle CRM On Demand Marketing, navigate to Admin, and then Job Status.

   b Select the Is Recurring Job check box.

    c In the Job Name menu, choose CCRMOD_ENTITY_DATA_SYNC.

    d Click Search.

    e Check the date and time status to see whether the run has completed after you imported the data from Oracle CRM On Demand.

Index