Oracle CRM On Demand Online Help

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1 Getting Started

Welcome to Oracle CRM On Demand, the smart customer relationship management solution that you access over the Web. Oracle CRM On Demand helps you to manage all your company's sales, customer service, and marketing information:

- If you are a sales professional, use Oracle CRM On Demand to optimise your sales efficiency and effectiveness by analysing your sales strategy, forecasting more accurately, and sharing critical sales information across your team.

- If you are a customer service representative, use Oracle CRM On Demand to maximise your customer satisfaction and service performance by tracking accounts, managing service requests, identifying cross-selling and up-selling opportunities, and providing solutions to customer inquiries.

- If you are a marketing representative, use Oracle CRM On Demand to capitalise on your marketing efforts by generating more leads, assigning leads automatically, and tracking campaign outcomes quantitatively.

- If you are an executive, use Oracle CRM On Demand to manage all areas of your business by gaining insight into your sales' outlook, quickly resolving critical business issues, and performing complex analyses.

In Oracle CRM On Demand, your information is grouped into the following main areas:

Calendar and Activities. Tracks your activities, including phone calls, events and to-do lists.

Campaigns. Manages marketing campaigns and generates qualified leads and opportunities.

Leads. Tracks leads for new sales opportunities and automates the lead conversion process.

Accounts. Tracks companies with which you conduct business.

Contacts. Tracks people associated with your accounts and opportunities.

Opportunities. Manages potential revenue-generating opportunities.

Forecasts. Generates forecasts to project quarterly revenue based on existing opportunities.

Service Requests. Manages customer requests for products or services.

Partners. Tracks the external companies or contacts at companies who sell or service products belonging to your company (Oracle CRM On Demand Partner Relationship Management Edition).

Partner Programs. Tracks the requirements and benefits for companies that are part of your company's partner programs (Oracle CRM On Demand Partner Relationship Management Edition).

Solutions. Stores answers to common questions or service issues.

Communication. Manages customer interactions through your call centre (Oracle Contact On Demand).

Reports. Generates a variety of reports supplying over 250 separate analyses, including pipeline visibility and sales effectiveness.

Dashboard. Displays a series of charts, graphs, and tables organised around your key business areas.

In addition, industry-specific solutions contain the following record types:

Vehicles. Tracks service history and sales history of vehicles (Oracle CRM On Demand Automotive Edition).

Dealers. Tracks associations with dealers (Oracle CRM On Demand Automotive Edition).

Events. Manages events and invitees (Oracle CRM On Demand Life Sciences Edition)

Funds. Manages fund requests, credits, and approvals (Oracle CRM On Demand High Tech Edition and Oracle CRM On Demand Partner Relationship Management Edition).

Portfolios. Tracks portfolio accounts (Oracle CRM On Demand Financial Services Edition).

Households. Tracks information for a group of related contacts (Oracle CRM On Demand Financial Services Edition).

You may also see other record types depending on the industry-specific solutions you have implemented.

NOTE: Your company administrator can rename the standard record types, so you may see different tab labels. For example, your company administrator might change "Accounts" to "Companies." Your company administrator can also add custom record types, as required.

What To Do First

Your company administrator has probably imported company-wide records for accounts, contacts, leads, and so on. Complete the following instructions to get you up and running quickly:

- Signing In as a New User (on page 25)
- Updating Your Personal Details (on page 836)
- Displaying Your Tabs (on page 854)
- Importing Your Contacts (on page 294)
- Creating Records (on page 51)
- Finding Records (on page 68)
- Updating Record Details (on page 103)
- Linking Records to Accounts (on page 270)

TIP: Click the Help link from any page for information regarding procedures, concepts, and guidelines specific to the record type you are working with. From any Help window, you can access the PDF version of the help content, allowing you to print a range of topics or the entire help content.

Note for first-time users:

- Your administrator might set up some alert messages so that they appear in separate windows when you sign in to Oracle CRM On Demand. If an alert window appears when you sign in, you can do the following after you read the message:

■ If you do not want this alert to show again in a separate window when you sign in to Oracle CRM On Demand, then select the check box labelled "I have read this, never show again". After you close the alert window, the alert will not appear again in a separate alert window, but the alert continues to be available to you through the Alerts section of My Homepage until the alert expires.

■ Click OK to close the alert window.

■ You might not see data in reports for the first 24-hour period after signing in because most reports are updated nightly. For example, the reports appearing on the Accounts, Contacts and Opportunities Homepages will not show data until after that initial period.

■ You may not see forecasts either, because forecast records are generated once a week or once a month. When generating forecast records, the system checks several fields in your records to determine which information should be included in the forecast calculations. Therefore, forecast records don't appear until the specified period has elapsed and data exists to include in the forecast.

About Running Other Applications

Other applications running in the background might interfere with Oracle CRM On Demand. For example, pop-up blockers can cause your mouse to lock. If you encounter some unconventional behaviour, make sure these applications are *not* running:

■ Virus checkers

■ External Java Runtime Environments

■ Pop-up blockers

■ External toolbars for your browser

NOTE: Ensure that your browser settings allow JavaScript to run and pop-up dialog boxes to display.

Signing In as a New User

To sign in as a new user in Oracle CRM On Demand, you must have a temporary URL for Oracle CRM On Demand and a temporary password. Oracle CRM On Demand sends this information to you by email, in two parts:

■ The first email contains the temporary URL that you use to access Oracle CRM On Demand for the first time.

■ The second email contains your temporary password.

Depending on how your company administrator sets up your user account, the email that contains your temporary password might also contain your user ID.

NOTE: Your user sign-in ID is shown on the Oracle CRM On Demand page after you sign in for the first time. Although you do not require your user ID the first time that you sign in to Oracle CRM On Demand, you must have it to access Oracle CRM On Demand after the first time you sign in. Therefore, it is recommended that you make a note of your user sign-in ID for future reference.

When you sign in for the first time, you are asked to set up a number of security questions. Take note of the security questions and answers that you set up. If you later forget your password, you will be required to

answer the security questions to reset your password. For more information about resetting your password, see Retrieving Your User Sign-In ID or Resetting Your Password (on page 172).

You can change your security questions at any time in Oracle CRM On Demand, for more information, see Setting Up Your Security Questions (on page 851).

To sign in as a new user

1 Click the Oracle CRM On Demand URL that you received in an email.

2 On the Sign-In page, enter the temporary password you received in an email.

3 Make a note of your user sign-in ID, which is shown in the User Sign In ID field on the Password Update page.

4 On the Password Update page, enter a new password of your choice in the New Password field, and then enter it again in the Verify New Password field.

   TIP: Be sure to make a note of your password to avoid repeating this task.

5 In the My Security Questions page, select the questions that you want to use as your security questions, and enter the answer for each question.

   The number of security questions that you must set up is determined by your company administrator.

   NOTE: Take note of the security questions and answers that you set up.

6 Save your security questions.

   My Homepage displays the information that you require to start using Oracle CRM On Demand. The tabs and features that you see by default depend on the role that you are assigned by your company administrator.

   NOTE: While using the Communications section in Oracle CRM On Demand, if your status changes to offline due to network connection problems, your login session automatically reconnects to the Oracle Contact On Demand server when Oracle CRM On Demand detects that the network is operational again.

About the Interface

Oracle CRM On Demand is built around a Web page interface. If you are familiar with the Web, the look and feel of the user interface will be familiar to you. All pages in Oracle CRM On Demand share the same basic, interface framework.

TIP: In the Internet Explorer browser, performance is better if you deselect the check box for the Do Not Save Encrypted Pages to Disk option. If this option is selected, JavaScript code is not cached and must be downloaded every time. In Internet Explorer Version 6 and later, this option is available under the Tools menu. From the Tools menu, select Internet Options, then Advanced.

How Themes and Theme Styles Determine the Appearance of the User Interface

In Oracle CRM On Demand, the background colour, hyperlink colour, text colour, tab style, and so on that you see in the user interface are determined by the theme that you use. Two theme styles are available in Oracle CRM On Demand: the classic style and the modern style. If you typically use a tablet computer to work with Oracle CRM On Demand, then you might find that a modern style theme is more consistent with user interfaces for other applications on your tablet computer. For example, in themes that have the modern style, the tabs that you use to access record-type homepages are presented as buttons. Several predefined themes are available: some in the classic style and some in the modern style. Your administrator can also create custom themes in either style.

The following table describes some of the differences in the appearance and functionality of the user interface with the different theme styles.

NOTE: The instructions provided in the online help typically reflect the functionality in themes that have the classic style.

User Interface Area	Classic Style	Modern Style
Action bar: Menu	The Action bar icon (three horizontal lines) appears immediately to the left of the tabs on your Oracle CRM On Demand page. To show or hide the Action bar, click the Action bar icon.	The Action bar icon (three horizontal lines) appears in the global header on each page in Oracle CRM On Demand. To show or hide the Action bar, click the Action bar icon.
Expand and collapse icons in Action bar and Detail pages	To expand a section, click the plus (+) icon beside the section title. To collapse the section, click the minus (-) icon.	To expand or collapse a section, click the section title or the arrows beside it.

User Interface Area	Classic Style	Modern Style
Global header	Not applicable	Your administrator determines what is available in the global header. For example, you might see an icon that allows you to open the Search section of the Action bar. In the standard application, you can access the Create section through the plus icon (+) in the global header. However, depending on how your administrator sets up the global header, you might see a different icon for the Create section. To open the list of the record types that you can create, click the icon for the Create section. Use the down and up arrows to find the record type that you want, and then click the name of the record type. If you want to close the list without selecting a record type, then click the page outside the menu. Alternatively, you can open the list of record types by resting your pointer on the icon for the Create section, and if you want to close the list without selecting a record type, then move your pointer away from the list.
Global links	Global links across the top of each page allow you to do the following: ■ Access resources such as the online help and the Deleted Items page ■ Access the pages where you can configure and personalise Oracle CRM On Demand ■ Sign out Global links to information about Oracle CRM On Demand, such as service information, appear at the bottom of each page. Your administrator determines which global links are available to you.	The global links and the Sign Out button are available in a menu under your user name at the top-right corner of each page. To open the menu, click or rest your pointer on your user name. Your administrator determines which global links are available to you.

User Interface Area	Classic Style	Modern Style
Related information links and head-up display	If the head-up display functionality is enabled, then links to the related information sections of the Detail pages are available in the head-up display at the bottom of your browser window.	Buttons are provided at the right of the Detail page to allow you to go directly to the related information sections on the page. If there are more buttons available than can be displayed at one time, then you can use the arrows provided to display the other available buttons. To go to a related information section, click the button for that section. The buttons for the related information sections are always available, even if the setting for the head-up display is not enabled on the company profile or on your personal profile.
Tabs for accessing record homepages and My Homepage	The tabs can have rounded edges or straight edges, or they can be stacked so that they overlap. If there are more tabs in your layout than can fit across the page in your browser window, then an arrow appears next to the far right tab. Clicking the arrow opens a list from which you can select any tab that is available to you but is not currently visible in your browser window. **NOTE:** If your browser window is less than 1024 pixels wide and some of your available tabs are not visible, then a scroll bar appears at the bottom of the page, allowing you to scroll to the arrow that opens the list of available tabs.	The tabs appear as buttons. If there are more buttons in your layout than can fit across the page in your browser window, then you can use the arrows provided to display the other available buttons. For example, if 15 buttons are available to you but only six buttons fit across the page, then you can click the right arrow to display the second set of six buttons, and click it again to display the remaining buttons. A full set of buttons is shown each time you scroll, so that in this example, you first see buttons 1 through six, then buttons 7 through 12, and finally buttons 10 through 15. You can then click the left arrow to move back through the buttons, six buttons at a time.

Other differences in the look and feel of the theme styles include the following:

- Some of the icons are different in the classic and modern theme styles. As an example, in themes that have the classic style, an up arrow icon is used to indicate high-priority tasks in task lists. In themes that have the modern style, an exclamation mark icon is used.

- There are differences in the appearance of the Calendar pages in the theme styles. For more information, see About Calendars and Theme Styles (on page 177).

About Default Themes and Tablet Themes

You can select two themes in your personal profile, a default theme and a tablet theme. The default theme is automatically used when you sign in to Oracle CRM On Demand using a desktop or laptop computer. The tablet theme is automatically used when you sign in to Oracle CRM On Demand using a tablet computer or other touch-screen device, provided that the tablet computer or touch-screen device is detected by Oracle CRM On Demand. If you do not select a default theme and a tablet theme in your personal profile, then the themes that are specified for your user role are used, and if no themes are specified for your user role, then the themes that are specified for your company are used. If a tablet theme is not specified at any level, then your default theme is used. For information about selecting themes, see Setting Your Theme (on page 846).

About Switching Between Your Default Theme and Your Tablet Theme

A global link allows you to switch between your default theme and your tablet theme, if both of the following conditions are true:

- A tablet theme is specified in your personal profile, or for your user role, or at company level.

- Your default theme and the specified tablet theme are not the same.

After you switch between themes, the new theme is used each time that you sign in to Oracle CRM On Demand from the same browser on the same computer, as long as you are signed in to the same user account on that computer. However, if you sign in to a different user account on the same computer, and then sign in to Oracle CRM On Demand, then your default theme or tablet theme is used as appropriate for the computer. Similarly, if you sign in to Oracle CRM On Demand from the same computer using a different browser, or if you sign in from a different computer, then your default theme or tablet theme is used as appropriate for the computer.

Action Bar

Your company administrator assigns an action bar layout to each user role. Your company administrator can also make the Action bar unavailable to your user role.

If the Action bar is available to your user role, then it appears on the left side of all Oracle CRM On Demand pages by default. You can hide and show the Action bar as required. For more information, see About Showing or Hiding the Action Bar (on page 40).

The Action bar can contain some or all of the following sections:

- Message Centre

  The Message Centre section contains notes for yourself, notes received from other users, and notes added to the records to which you subscribe. For more information about the Message Centre, see Working with the Message Centre (on page 44).

  The Message Centre only appears if the company profile has Message Centre enabled.

- Search

  The Search section allows you to find existing records. For example, you can perform a search to determine if a record exists before creating one, thereby reducing the duplication of records. For instructions on using the Search section, see Searching for Records in the Action Bar (on page 81).

- Communication Tools

If your company uses Oracle Contact On Demand, the call centre application, you use the Communication Tools and Voice Controls sections in the Action bar to perform tasks in Oracle Contact On Demand.

■ Create

From the Create section, you can open a form to add a new record. The form works independently of the main Web pages so you won't lose your place within the application.

For example, you can create an opportunity from the Create section of the Action bar while you are updating information in an account in the main section of the Oracle CRM On Demand page. When you expand the Create section of the Action bar and click Opportunity, a form opens. You can then enter the required opportunity information in the form, and save the record. The new opportunity is saved to the database and you can continue updating the account information.

For instructions on using the Create section, see Creating Records (on page 51).

■ Recently Viewed

The Recently Viewed section provides links to the 10 most recently viewed, edited, or created records, including records from previous sessions. Drilling down to the Detail page for a record triggers that record's inclusion in the Recently Viewed section.

This feature allows you to easily access your active records. If you delete a record, it is removed from the Recently Viewed list. If another user deletes a record, it remains in the Recently Viewed list, and if you select the record, a message is displayed informing you that the link no longer exists.

NOTE: If you close the browser window to exit Oracle CRM On Demand instead of clicking the Sign Out link, then when you sign in again to Oracle CRM On Demand, the records that you viewed during your last session might not appear in the Recently Viewed section of the Action bar. It is recommended that you always use the Sign Out link to exit Oracle CRM On Demand.

■ Favourite Records

The Favourite Records section provides links to the records that you have marked as your favourites. This feature allows you to quickly access the records that you use most often. The Favourite Records section in the Action Bar can contain up to 10 records at a time. You can view a complete list of your favourites by clicking the Show Full List link. When you click the Show Full List link, the Favourite Records page opens, and you can manage your favourite records. You can have a maximum of 100 records in your favourites. For more information about the Favourite Records page, see Favourite Records Page (on page 112).

■ Favourite Lists

The Favourite Lists section provides links to the lists that you have marked as your favourites. This feature allows you to quickly access the lists that you use most often. The Favourite Lists section in the Action Bar can contain up to 10 lists at a time. You can view a complete list of your favourites by clicking the Show Full List link. When you click the Show Full List link, the Favourite Lists page opens, and you can manage your favourite lists. You can have a maximum of 100 lists in your favourites. For more information about the Favourite Lists page, see Favourite Lists Page (on page 130).

TIP: You can add lists to your favourite lists by clicking the Add to Favourites icon, which is displayed beside the list name on the Manage List page and in the title bar of the list page itself.

■ Calendar

This section contains a calendar with the current date highlighted. When you click a date in the calendar, the Daily Calendar page is displayed for that date. The calendar section does not appear by

default, but you can add it to the Action bar in your personal layout. To edit the Action bar in your personal layout, click the My Set-up global link, click Personal Layout, and then click Action Bar Layout.

■ Custom Web applets

Your company administrator can create Web applets that can be added to the Action bar to display HTML Web content (for example, polls, videos) and RSS feeds. For more information about custom Web Applets, see About Custom Web Applets.

You can expand or collapse the sections in the Action bar. Your Action bar settings persist when you move through Oracle CRM On Demand. If you hide the Action bar, then the settings for the sections within the Action bar persist even though the Action bar is hidden, and the settings are available if you show the Action bar again.

If your user role has the appropriate privilege, you can change the layout of your Action bar through the My Set-up global link. You can display or hide any of the Action bar sections that your company administrator has made available in the Action bar layout for your user role, including Web applets. For more information, see Changing Your Action Bar Layout (on page 865).

Record Type Tabs

Across the top of each page are tabs that open the homepages for the top-level record types that are available to you. For example, if you click the Contacts tab, then the Contacts Homepage opens. The number of tabs that you see depends on the size and resolution of your browser window and on how many tabs are in your tab layout. To learn more about the tab layout, see Displaying Your Tabs (on page 854).

Sections

Each page contains areas called *sections.* These sections group together relevant information for the types of records you're working with.

For example, the Accounts Homepage can show sections for Account Lists, Account Tasks, Recently Modified Accounts, and the Account Analysis Chart.

A section can contain the following types of information:

■ **Lists**. Shows records in rows.

■ **Forms.** Shows fields for the records in a form.

■ **Charts/Graphs.** Shows information in a variety of charts and graphs.

On Detail pages, you can expand or collapse the whole form as well as the individual sections in the form. This is useful for avoiding a lot of scrolling and for hiding information in which you are not interested. To collapse a form or section, click the minus icon (-). To expand a section or form, click the plus icon (+). The buttons in each section are visible even when the section is collapsed. The expanded or collapsed state persists across sessions.

List pages and Edit pages do not have this expand and collapse functionality.

Error Messages and On-Screen Help Text

Error messages, when displayed, are indicated by the following icon:

On-screen help text is indicated by the following icon:

Field-Level Tooltip Text

Your administrator can optionally add tooltip text for fields. If tooltip text is available for a field, then the text label for the field is underlined with a dotted line in the record Detail and Edit pages, and in the column headings in List pages and related information sections in the record Detail pages, as shown in the following example:

Account Name

To see the tooltip text, rest your pointer on the field label. For more information about tooltip text, see Oracle CRM On Demand Page-by-Page Overview (on page 34).

Global Links

On each page in Oracle CRM On Demand, global links at the top of the page allow you to access certain resources and to access your personal profile, where you can personalise your settings, page layouts, and so on. The following table describes the action that occurs when you click each of the standard links. Your company administrator can add custom links on the Oracle CRM On Demand pages and can also hide some of the standard links.

Clicking this link	Does this
Switch to Default Theme or Switch to Tablet Theme	Allows you to switch between your default theme and your tablet theme. For more information, see About Default Themes and Tablet Themes in this topic.
Training and Support	Opens the Training and Support Homepage, which provides access to a range of Training and support resources, including the schedule of free Oracle CRM On Demand Webinars and other training courses. From this page, you can create a service request. Make sure that you have the following information: ■ Any error messages displayed in your window ■ A description of the problem, including the steps you were taking when the error occurred
Admin	Opens the pages where administrators can customise the application. Appears

Clicking this link	Does this
	only for those users assigned a role with administrative privileges.
My Set-up	Opens the Personal Homepage, where you can update your personal profile and edit the page layout.
Deleted Items	Opens the Deleted Items page, where you can view and restore most deleted items up to 30 days after deletion.
Help	Opens online help at its top topic, displays the table of contents and shows the Search tab to find information in the help files. From any help window, you can access the PDF version of the help content, allowing you to print a range of topics or the entire help content.
Sign Out	Exits Oracle CRM On Demand.

Additional Links

Each page also contains several links that appear just to the right of the page name. This table describes the action that occurs when you click each of these links:

Clicking this link	Does this
Edit Layout	(Homepages and Detail pages only). If your user role has the appropriate privileges, then the Edit Layout link opens the pages where you can add, rearrange, or hide sections of the page you are viewing. For Detail pages, you can also hide some fields and rearrange the fields on the page.
Help	Opens an online help topic specific to that page or procedure.
Printer Friendly	Opens a separate page, where you can print the data on your page. The Printer Friendly link is available from all pages except the Edit pages.

Oracle CRM On Demand Page-by-Page Overview

Oracle CRM On Demand provides several Web pages for each record type (Accounts, Contacts, and so on).

Homepages

Most Homepages show you tasks related to the types of records that correspond to that page, such as account-related tasks. Generally, they also show filtered lists that have been defined by your company administrator as well as an analytic chart relevant to your work. Homepages can also contain Web widgets, RSS feeds and other Web content, depending on what your company administrator has set up.

From the Homepage, you can manage the various types of information you need, drilling down to other pages.

List Pages

The List pages show the subset of records according to the list you select from the Homepage. From the List pages, you can:

- Sort the records.

- Review multiple records at a glance.

- Find a record to review, delete or update.

- Update the fields on the List page inline, if the inline edit functionality is enabled.

- Open a record Detail page in the record pane and update the record details without navigating away from the List page, if the record pane is available in the List page.

- Create new records.

- Add the list to the Favourite Lists section in the Action bar by clicking the Favourites icon.

- Refine the list within the List page, if the Toggle Refine List Pane icon is available. For more information, see Refining Lists Within List Pages (on page 125).

- Change the order of the columns in the list, by dragging the column headings to a new location and dropping them.

In addition, you can use the record-level menu beside each record name to perform various actions on the listed records, including some or all of the following:

- Open the Edit page for the record (by selecting the Edit option), where you can edit all of the fields on the record.

- Create a new record by copying the existing record. Your company administrator determines which field values are automatically copied to the new record.

- Delete a record.

Depending on your company set-up and the set-up in your user profile, the column headings in List pages might always remain in view when you scroll down a page of records. This feature can be turned on or off at company level, but you can override the company-level Freeze List Column Header setting in your personal profile. For information about changing the Freeze List Column Header setting in your personal profile, see Updating Your Personal Details (on page 836).

NOTE: If tooltip text is available for a field, then the text label for the field is underlined with a dotted line in column headings in List pages.

Manage Lists Pages

The Manage Lists pages show the standard filtered lists and the lists that either you created for your own use, or your manager created for employees to use. From the Manage Lists pages, you can:

- Delete a list.

- Review the entire list of filtered lists.

- Edit a list you or your managers created or begin the process for creating another filtered list.

- Select lists to add to the Favourite Lists section in the Action bar.

Detail Pages

A Detail page shows the information for one record. The top section of the page displays the fields for the record. If inline editing is enabled, then you can update these fields inline. Depending on the set-up of your user role, you might be able to personalise the layout of the fields on record Detail pages. For more information, see Changing Your Detail Page Layout (on page 855).

Field Labels and Tooltip Text

Depending on how your administrator sets up the fields, a field that appears on a record Detail page can be labelled with a text label or with an icon that indicates the purpose of the field. For example, a field to hold a mobile phone number might be labelled with the text label *Mobile Phone Number*, or it might be labelled with an icon that represents a mobile phone. Your company can also set up a field so that no label is shown for the field.

Your administrator can optionally add tooltip text for fields. If tooltip text is available for a field, then the text label for the field is underlined with a dotted line in the record Detail and Edit pages, and in the column headings in List pages and related information sections in the record Detail pages, as shown in the following example:

Account Name

Depending on how a field is labelled and on whether tooltip text is available for the field, the tooltip text is shown as follows:

- **Field text labels.** If tooltip text is available for the field, then the tooltip text appears when you rest your pointer on the text label for the field.

- **Field icon labels.** If tooltip text is not available for the field, then the field name appears when you rest your pointer on the icon. If tooltip text is available for the field, then the tooltip text appears when you rest your pointer on the icon.

- **Fields with no label.** No tooltip text is shown.

Images on Detail Pages

For certain record types, your company administrator can specify that an image can be displayed on the record Detail pages. If your administrator specifies that an image can be displayed on a record Detail page, then a placeholder for an image appears at the top left of the Detail page, and you can upload the image that you want to display. You cannot change the location of the image on the page. For more information, see Displaying Images on Record Detail Pages (on page 65).

Related Information Sections

At the bottom of a record Detail page, you can access related information sections that contain lists of records that are linked to the main record. Depending on your set-up, the related information sections appear as lists or as tabs. In the standard application, each related information list of linked records on the Detail page shows up to five records of one record type. In the lists of linked records, you can do some or all of the following, depending on the record type and on your access-level settings for the record type:

- Open the full list of related records of a given record type.

■ Link additional records to the main record.

■ Create new records that are linked to the main record.

■ Review already linked records.

■ Edit some of the fields on records linked to the main record if inline editing is enabled.

■ Change the order of the columns in the list, by dragging the column headings to a new location and dropping them.

If your user role has the Personalise Related Information Display Format privilege, then you can choose to show the related information sections as lists or as tabs, by setting the Related Information Format option in your personal profile. If the Related Information Format field in your personal profile is blank, then the setting for your user role is used; and if the Related Information Format field on your user role is blank, then the setting for the company is used.

If the related information sections appear as tabs, and if the Enable Enhanced View for Tabs check box on the company profile is selected, then additional list functionality, such as sorting and filtering, is also available in the related information sections. For more information, see About the Enhanced View for Related Information Tabs (on page 66).

Depending on the set-up of your user role, you might be able to personalise the layout of the related information sections on record Detail pages. For more information, see Changing Your Detail Page Layout (on page 855).

For many of the record types that appear in related information sections, your administrator can create layouts that specify which fields are displayed in the list of related records. In the case of some record types, your administrator can also determine which field is used to sort the list of related records when the list is initially displayed, and whether the records are sorted in ascending order or descending order.

Scrolling Through the Related Information Tabs

If you use a classic theme, and if the related information sections appear as tabs, then there might be more tabs available than can fit across the page in your browser window. In that case, you can click the arrows on the right and left of the tabs to scroll through the tabs. The scrolling behaviour of the tabs is determined by the Enable Classic Theme Paging for Tabs check box on the company profile, as follows:

■ If the Enable Classic Theme Paging for Tabs check box is deselected, then the right and left arrows scroll through the tabs one at a time.

■ If the Enable Classic Theme Paging for Tabs check box is selected, then clicking the right and left arrows displays the next or previous set of tabs. For example, if 15 tabs are available to you but only six tabs fit across the page, then you can click the right arrow to display the second set of six tabs, and click it again to display the remaining tabs. You can then click the left arrow to scroll back through the tabs, six tabs at a time.

Record Indicators for Related Information Tabs

If your user role has the Personalise Detail Page - Records Indicator privilege, then you can set up the related information sections so that indicators appear on the tabs for the related information sections to show whether any records are present in the sections. Your administrator can also configure the record indicators for the Detail pages for the record types at role level. If the record indicators are set up to appear for one or more of the tabs, then the behaviour of the indicators is as follows:

■ No indicator appears in the first tab in your set of related information sections, even if the indicator is set up to appear for this tab. The tab opens automatically when you open the record Detail page, so you can see at a glance whether there are any records in the related information section.

■ For any tab for which the indicators are set up to appear, the indicators appear as follow:

  ■ If any records are present in the related information section for that tab, then an asterisk displays on the tab.

  ■ If no records are present in the related information section for that tab, then a circle with a line through it displays on the tab.

■ If you add one or more records in a related information section that previously contained no records, then the indicator is usually updated dynamically to show that the related information section now contains records. Similarly, if you remove all of the records from a related information section, then the indicator is usually updated dynamically to show that the related information section contains no records. However, in some cases, a change to the contents of a related information section does not require the related information section to be refreshed, and in such cases the record indicators are not updated dynamically. For example, if you add a primary account to a contact record that previously had no account linked to it, then the record indicator on the Accounts related information section on the Contact Detail page is not updated dynamically. In such cases, the record indicators are updated the next time that you open the Detail page for the parent record, or you manually refresh your browser when viewing the record Detail page.

NOTE: If the related information sections on your record Detail pages appear as tabs, and if the Enable Enhanced View for Tabs check box is selected on the company profile, then you can apply filters to the lists of records in the related information sections. If you open a related information section that contains records, and if you then apply a filter to the related records so that no records are shown in the section, then the record indicator for that tab continues to indicate that the related information section contains records. And, if you open a different tab and then open the original tab again, the filter still applies and no records are displayed. However, the record indicator for the tab continues to indicate that the related information section contains records.

For more information about setting up record indicators, see Managing Record Indicators for Related Information Sections (on page 863).

NOTE: If you use a modern theme, and if the record indicators are set up to display for the related information sections, then the record indicators appear on the buttons for the related information sections.

Using the Head-Up Display to View Related Information Sections

The *head-up display* is a list of links to the related information sections of the page. The head-up display might also be available at the bottom of your browser window. For the head-up display to be available, the head-up display functionality must be enabled. You can enable or disable the head-up display by setting the Head-up Display option in your personal profile. If the Head-up Display field in your personal profile is blank, then the setting for the company is used. The following procedure describes how to use the head-up display.

To use the head-up display to view related information sections

■ Do one or more of the following:

  ■ Go to the related information lists or tabs, without having to scroll down the page, by clicking the links in the display.

■ Collapse the head-up display by clicking the minus sign (-) in the display.

■ Expand the display again by clicking the plus sign (+).

The collapsed or expanded setting in the head-up display is maintained for all record types until you change it again, even if you sign out of Oracle CRM On Demand and sign in again.

NOTE: For information about changing the Related Information Format option and the Head-up Display option in your personal profile, see Updating Your Personal Details (on page 836).

Tasks That You Can Perform on the Detail Pages

On the Detail pages, you can also do the following:

■ Create a new record by copying the existing record (for most record types). Your company administrator determines which field values are automatically copied to the new record.

■ Expand and collapse the sections in Detail pages as required. These settings are maintained until you change them again, even if you sign out of Oracle CRM On Demand and sign in again.

■ Click an icon on the Detail page to add the record to the Favourite Records section in the Action bar.

■ Click the Note icon to add notes or view notes from other users.

■ Send a note to another user by moving the pointer over the name of the user, see Sending Notes to Other Users (on page 146).

Detail pages can also contain custom Web applets set up by your company administrator. These are used to embed Web widgets, RSS feeds and other Web content on the page. For more information, see About Custom Web Applets.

New Record Pages

You can create records from different areas in Oracle CRM On Demand. The field layout that you see on the page where you enter the information for a new record depends on how your user role is set up. For more information about the field layout on new record pages, see About the Layouts of New Record Pages (on page 50).

Edit Pages

The Edit pages show the fields for a record in editable format. You can use the following pages to update the record information. The record fields on the Edit pages are identical to the top part of the Detail pages. If tooltip text is available for a field, then the text label for the field is underlined with a dotted line in record Edit pages.

Both Edit pages and Detail pages can contain custom Web link fields. For a particular Web link, the administrator can specify whether it appears on the Edit page, Detail page, or both, as described in Setting Up Web Links.

Layout Pages

Administrators and other users who have the necessary privileges can configure and personalise the layout of many pages in Oracle CRM On Demand, as well as configuring tab layouts, Action bar layouts and so on. In

the Layout pages where you configure such layouts, you typically specify the configuration that you want by selecting items in one list and moving them to another list.

To move the values from one list to another list in the Layout pages, you can use the left and right arrows that are provided in the page, and the instructions in the online help typically describe this method of moving the values. However, in many Layout pages, you can also move a value from one list to another list by double-clicking the value. When you double-click a value, it is moved to the list immediately to the right of the list in which it previously appeared. If you double-click a value in the rightmost list, then the value is moved to the list immediately to the left of the list in which it previously appeared.

NOTE: In cases where the lists in the Layout page are presented in a grid format, such as the Layout pages for personalising or customising field layouts for record Detail pages, the ability to move a value from one list to another list by double-clicking the value is not supported. Also, the ability to move a value from one list to another list by tapping the value on a touch device is not supported.

Typically, up and down arrows are also provided in the Layout pages to allow you to change the order of items within a list of items.

NOTE: The ability to move a value from one list to another is also supported in other areas in the interface. For example, in the Display Columns section in a list set-up page, you can move fields from the Available Fields list to the Selected Fields list by double-clicking the field names. Also, in the window where you select values for a multi-select picklist field, you can move the values that you want to the Selected list by double-clicking the values.

About Showing or Hiding the Action Bar

Your company administrator assigns an action bar layout to each user role and can also make the Action bar unavailable to user roles. If the Action bar is available to your user role, then it appears each time that you sign in to Oracle CRM On Demand. During your session in Oracle CRM On Demand, you can hide and show the Action bar as required by clicking the Action bar icon (three horizontal lines).

If you use a classic theme style, then the Action bar icon appears immediately to the left of the tabs on your Oracle CRM On Demand page. If you use a modern theme style, then the Action bar icon appears in the global header on each page in Oracle CRM On Demand.

NOTE: If the Action bar is unavailable to your user role, then you cannot show the Action bar.

My Homepage

From My Homepage, you can review the information for your working day. You can:

■ Check your schedule for appointments in the Today's Calendar section.

■ Review time-sensitive alerts that inform you of deadlines, such as submitting forecasts, in the Alerts section. Alerts are set up by your company administrator. Your administrator might also set up some alert messages so that they appear in separate windows when you sign in to Oracle CRM On Demand. If an alert window appears when you sign in, you can do the following after you read the message:

■ If you do not want this alert to show again in a separate window when you sign in to Oracle CRM On Demand, then select the check box labelled "I have read this, never show again". After you close the

alert window, the alert will not appear again in a separate alert window, but the alert continues to be available to you through the Alerts section of My Homepage until the alert expires.

■ Click OK to close the alert window.

■ Scan the list of open tasks, sorted by the due date and priority (up arrow for 1-High, no arrow for 2-Medium, down arrow for 3-Low), in the Open Tasks section.

NOTE: If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values.

■ Review recently created or recently modified records.

In the standard application, the Recently Created Leads section displays the leads that were created most recently. You or your company administrator can customise My Homepage to display other types of records.

■ View a list of your favourite contacts.

The Favourite Contacts section shows the names of a maximum of 10 contacts that you added to your favourite records. The order of the contacts in the Favourite Contacts section is determined by the date on which you added the contacts to your favourite records, and not by the date on which the contact records were created. The contacts are listed in descending order by date, with the contact that you most recently added to your favourite records appearing at the top of the list. From the Favourite Contacts section, you can open the full list of your favourite contacts by clicking Show Full List. For information about the Favourite Contacts list, see About the Favourite Contacts List (on page 301).

■ Review an analysis relevant to you.

One or more report sections might be shown on My Homepage, depending on how your company administrator has configured My Homepage. In the standard application, My Homepage shows an analysis of the quality of your opportunities for the current quarter (Pipeline Quality for Current Quarter).

■ View Web widgets, RSS feeds and other Web content.

Depending on what the company administrator has set up and on what is included in your page layout, you can view embedded Web content on My Homepage. This Web content might include Web widgets, such as Google maps or corporate videos and RSS feeds. For more information about how external Web content is set up, see About Custom Web Applets.

Your company administrator can customise the layout of My Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

The following table provides instructions for typical tasks you can perform from My Homepage.

To do this	Follow these steps

To do this	Follow these steps
Alerts	
View all alerts	In the Alerts section, click the Show Full List link. The Alerts page opens.
View an alert	In the Alerts section, click the link for the alert. The Alert page opens with additional information about the alert.
Appointments	
Create an appointment	In the Today's Calendar section, click New. On the Appointment Edit page, fill in the required information and save the record.
Review an appointment record	In the Today's Calendar section, click the Subject link of the appointment that you want to review. The Appointment Detail page appears.
Review this month's appointments	In the Today's Calendar title bar, click the 31 icon. The Calendar opens with the month's schedule.
Review this week's appointments	In the Today's Calendar title bar, click the 7 icon. The Calendar opens with the week's schedule.
Review today's appointments	In the Today's Calendar section, click the View Calendar link, or the 1 icon. The Calendar opens with your appointments for today.
Layout	
Change the layout of My Homepage	To change the information that appears in two sections on My Homepage, click Edit Layout, and click the arrows to add or remove sections, and to organise the sections on the page.
Records	
NOTE: In the standard application, the Recently Created Leads section displays the leads that were created most recently. You or your company administrator can customise My Homepage to display other types of records, for example, Recently Modified Accounts.	
Create a record	In the title bar of the section that displays records, click New. On the Edit page, fill in the required information and save the record.
Review a record	In the section displaying records, click the link of the record that you want to review. The Record Detail page opens.
Review a list of records	In the section displaying records, click Show Full List. The Record List page opens.
Reports	

To do this	Follow these steps
Slice the chart by another category	Depending on the analysis that appears, you might be able to click the drop-down list and change the selection. The chart and table show the data categorised by your selection. In the standard application, you can do this with the Pipeline Quality for Current Quarter.
View the records comprising a segment in the chart or table	Depending on the analysis that appears, you might be able to drill down on a segment or link to view the records comprising that category. In the standard application, you can do this with the Pipeline Quality for Current Quarter section.
Tasks	
Create a task	In the Open Tasks section, click New. On the Task Edit page, fill in the required information and save the record.
Review a task record	In the Open Tasks section, click the Subject link of the task that you want to review. The Task Detail page appears.

Reviewing Your Alerts

Company-wide alerts appear on My Homepage. Company administrators use alerts to broadcast company-wide information, such as meeting notices and policy changes. If you are a sales representative whose information is included in your company's sales forecasts, you will receive an alert when the forecast has been generated as well.

NOTE: Your administrator might also set up some alert messages so that they appear in separate windows when you sign in to Oracle CRM On Demand. For more information about alert windows, see My Homepage (on page 40).

To review your alerts

7 Click the Home tab.

8 In the Alerts section, you can:

■ Click the link for the alert you want to review, if it currently appears on My Homepage.

The Alerts page opens with additional alert information about that alert.

■ Click the Show Full List link.

The Alerts (List) page opens where you can select an alert, select an option from the drop-down list to limit the types of alert records you see, or create your own filtered list for alerts.

Related Topics

See the following topics for related information:

- Alert Fields
- Working with Lists (on page 112)

Working with the Message Centre

The Message Centre in the Action bar allows you to manage notes for yourself, notes from other users, and notes about records, all in one place. The Message Centre therefore promotes more effective communication and collaboration within Oracle CRM On Demand.

The Message Centre can contain:

- **Notes that you create for yourself.** You can create notes for yourself in the Message Centre. This is useful for recording actions that you want to follow up on, or for information that you want to refer to later. These private notes are indicated by an icon showing a key.

- **Notes on records to which you subscribe.** On record types that support the notes feature, you can keep track of conversations about a particular record, by navigating to the Detail page and subscribing to any new notes added on the record. You will then get a copy of all such notes in the Message Centre, and you can reply to the record from the Message Centre. You only get a copy of new notes added to the record; you do not get notes about other changes to the record.

- **Notes sent to you by other users.** Another user can click on the note icon next to your name in a page in the application and send a note to you. Notes sent to you in this way are indicated by an icon showing two people.

The Message Centre contains a note (pushpin) icon and the number of new messages is displayed next to the note icon.

When you click the note icon in the Message Centre, the list of notes is displayed. For each note, the name of the user who created the note is displayed, together with the subject or first part of the note text, if there is no subject. The date of the note is displayed, or if the note is from today, the time.

From the list of notes you can do the following:

To do this	Follow these steps
View a note	Scroll down to the required note. If the note is linked to a record to which you are subscribed, you can drill down on the record from the link in the note.
Create a new note	Click New Note. Type a subject on the first line if required, type the note, and click Save. The subject is optional; if you do not provide a subject, the first few characters from the text of the note are copied to the subject line.
Reply to a note	Scroll down to the required note, click Reply, and type your note. When you click Save, your reply is sent to the Message Centre of the user who sent you the note. If you select Post, your reply is posted to the

To do this	Follow these steps
	relevant Detail page, and is sent to all users subscribed to the record.
Delete a note	Scroll down to the required note, and click Delete. This action deletes the copy of the note from your Message Centre, but does not delete the actual note on the record Detail page.
View details of the user who sent a note	Scroll down to the required note, and click the user name. The User Details page for the user is displayed.

You can embed the Message Centre as a Web widget in other applications. For more information, see Embedding a Message Centre Widget (on page 873).

When the Message Centre is embedded as a Web widget, you can click the Refresh button to update the Message Centre with the latest messages from Oracle CRM On Demand.

Working with RSS Feed Applets

In Oracle CRM On Demand, you can use RSS feed applets to subscribe to frequently updated content in which you are interested, such as blog entries, news headlines, or podcasts. This content can, for example, supplement your CRM information with information from news providers to which you have subscribed.   You might have general market news displayed in your homepage. You might have news and information that is specific to your client's employers in the Contacts detail page.

Oracle CRM On Demand has a feed reader built into the application, which aggregates content so that you never have to leave the application. For example, rather than having to visit other Web sites for market news, the information is delivered within Oracle CRM On Demand. In addition to aggregating content, the feed reader can accept user and record field parameters.

RSS feed applets are a type of custom Web applet, created by the company administrator, in which the URL for an RSS feed is specified.   RSS feed applets can therefore appear in the following places:

- My HomePage
- Record type homepages
- Record type Detail pages
- The Action bar

For more information about custom Web applets, see About Custom Web Applets.

You must add the applet to the homepage layout, detail page layout or Action bar layout if it does not already appear on the page or Action bar.

Your company administrator can specify that an RSS feed applet is configurable. If this is the case, a Configure link is displayed with the applet, and you can change the name of the applet and the URL associated with the applet so that a different RSS feed is displayed. If an RSS feed applet is not configurable, the Configure link is not displayed.

NOTE: Your company administrator will only make a few RSS feed applets configurable.

If the company administrator deletes an RSS feed applet, the customised versions of the applet are also deleted from the application.   For example, if a user has an applet for a CNN news feed on his homepage, and

another user has configured the applet for a BBC news feed on her homepage, both users lose access to the applet feed if the original RSS feed applet is deleted.

To configure an RSS feed applet

1 Click the Configure link.

2 In the Name field, type an appropriate name for the applet.

3 In the URL field, edit the URL as required.

4 Click Save.

The feed is refreshed with data from the configured URL. For more information on the standardization of URLs in Oracle CRM On Demand, see About URL Standardization.

Note: You can click Use Default to return to the URL as defined by the company administrator.

Working with Records

This topic describes the following common procedures for working with records:

- Creating Records (on page 51)
- Finding Records (on page 68)
- Previewing Records (on page 101)
- Updating Record Details (on page 103)
- Linking Records to Your Selected Record (on page 104)
- Updating Linked Records from Main Records (on page 111)
- Working with Lists (on page 112)
- Creating and Refining Lists (on page 118)
- Exporting Records in Lists (on page 131)
- Transferring Ownership of Records (on page 133)
- Sharing Records (Teams) (on page 134)
- Changing the Primary Custom Book on a Record (on page 137)
- Updating Groups of Records (on page 137)
- Merging Records (on page 138)
- Adding Notes (on page 143)
- Attaching Files and URLs to Records (on page 150)
- Deleting and Restoring Records (on page 161)

■ Printing Information That Appears on Pages (on page 170)

Related Topics

See the following topics for related information:

■ Import and Export Tools

■ About Data Access, Record Sharing, and Record Ownership (on page 47)

About Data Access, Record Sharing, and Record Ownership

Your access to data in Oracle CRM On Demand is determined by certain access-control components that are associated with your user role in Oracle CRM On Demand, as follows:

■ **Privileges.** You can access certain business data or administrative data if your user role is granted the privilege for that data. For example, if your user role has the Manage Workflow Rules privilege, you can access all of the workflow configuration data.

■ **Record-type access and access profiles.** To access records of a given record type, your user role and your access profiles must have the appropriate settings, as follows:

■ For top-level record types, access to the record type must be granted to your user role. For example, to access any account record, your user role must be granted access to the Account record type.

■ Your access profile must allow you to access the record type. Access profiles also control which operations you can perform on the data that you can access. For example, your owner access profile could grant you editing rights to account records that you own, and your default access profile could grant you read-only rights to account records that you view through shared access but do not own.

   NOTE: Access profiles are also used in various record-sharing mechanisms, which are explained in the next section.

Record-Sharing Mechanisms

Users can share records through the following record-sharing mechanisms:

■ **The company's reporting hierarchy.** For example, a manager can see a subordinate's records.

■ **User delegation.** For example, a user can delegate access to another user who might not be in the same reporting hierarchy.

■ **Custom book membership.** For example, a diverse group of users can be granted access to a set of records associated with a custom book called *Hot Deals.*

■ **Team membership**. For example, the owner of an account record can share the account with a set of users at his discretion.

■ **Group membership.** A *group* is a predefined team of users. For example, if a user who is a member of a group becomes the owner of a contact record, all other members of the same group are also added to the contact team. For more information about groups, see Group Management.

NOTE: Sharing data through custom books is the most efficient method of sharing data for large companies where users share more than one million records.

Record Ownership Modes

For most of the record types that support custom books, your company administrator can set up record ownership for the record type in user mode, book mode, or mixed mode. Depending on your company's policies and on the ownership modes that are configured for the record types, you can own records directly, access records through record-sharing mechanisms, or a combination of both. The record ownership modes are as follows:

- **User mode.** When a record type is configured in user mode, each record of that record type must have an owner assigned to it. A user owns a record when the user is associated with the Owner field of the record. If the Book field is available on the detail page of the record, then the Book field displays the user book associated with the owner.

- **Book mode.** When a record type is configured in book mode, records of that record type do not have owners assigned to them. Instead, each record must have a primary custom book associated with it. Associating a primary custom book with a record does not mean that the custom book owns the record, because a custom book is a record-sharing mechanism. Associating a primary custom book with a record indicates only that the record primarily belongs to a custom book and does not belong to any particular user. The book mode is useful in reports where you want to indicate that a record belongs to a certain custom book so that it is not counted multiple times if the record is also shared with other books.

- **Mixed mode.** When a record type is configured in mixed mode, a record of that record type can be set up in any one of the following ways:

  - The record can be set up without either an owner or an associated primary custom book.

  - The record can have an owner assigned to it.

  - The record can have a primary custom book associated with it.

For record types that do not support custom books but require an owner, only the user mode of record ownership is supported.

In any record ownership mode, a record cannot have both an assigned owner and an associated primary custom book. However, in any of the ownership modes, you can assign additional custom books to a record, if the record type supports custom books.

If the Book field is present on a record Detail page, then the field can show the name of a user book or a primary custom book for the record, or the field might be blank, as follows:

- If the record is owned by a user, then the Book field shows the name of the user book for the record owner.

- If the record is not owned by a user, then the Book field might show a primary custom book for the record, or the field might be blank.

Your company administrator configures the record ownership mode by making certain fields required for the record type. Your company administrator can change the record ownership mode for a record type. For information about configuring record ownership modes, see Configuring Record Ownership Modes.

Default Values in Owner and Book Fields

When you open a New record page, the values in the Owner and Book fields are as follows:

■ If the record type is configured in user mode, then the Owner field is automatically populated with your alias. The Book field, if it is present, is automatically populated with the name of your user book.

■ If the record type is configured in mixed mode, then neither the Owner field nor the Book field is populated.

> **NOTE:** Appointments that you create through your calendar are an exception to the normal behaviour for record ownership modes. When you create an appointment through your calendar, the Owner field is populated with your name, regardless of the record ownership mode.

■ If the record type is configured in book mode, then the following happens:

   ■ The Owner field on the new record is not populated.

   ■ For the Book field, the default value depends on the default book that is specified for the record type on your user record, as follows:

      ■ If a custom book is specified as the default book for the record type, then the Book field on the new record is automatically populated with the name of the specified default book.

      ■ If a default book is not specified for the record type, or if a user book or the All book is specified as the default book for the record type, then the Book field is not populated on the new record. For information about the All book, see Using the Book Selector (on page 93).

> **NOTE:** Either the Owner field or the Book field can be a required field on a page layout, even if the record type is configured in mixed mode. If the Owner field is required, then the Owner field is blank by default when you open a New record page, but you must select an owner for the record before you save the record. When you select an owner for the record, the Book field shows the name of the user book for the owner. If the Book field is required on the page layout, then you must select a primary custom book before you save the record.

What Happens When the Record Ownership Mode for a Record Type Changes?

When the record ownership mode for a record type changes from one mode to another mode, then the following happens:

■ When you create a new record of that record type, you might be required to select an owner for the record or to associate a primary book with the new record, depending on the new ownership mode.

■ If you are the first user to update a record after the ownership mode changes, then you might be required to select an owner or a primary book for the record before you can save your changes, depending on the new ownership mode. The following table shows the behaviour in each circumstance.

Old Mode	New Mode	Behaviour
User mode	Book mode	You are required to select a primary custom book in the Book field.
User mode	Mixed mode	You can select an owner in the Owner field or a primary custom book in the Book field, but you

Old Mode	New Mode	Behaviour
		cannot select both.
Book mode	User mode	You are required to select a user in the Owner field.
Book mode	Mixed mode	You can select an owner in the Owner field or a primary custom book in the Book field, but you cannot select both.
Mixed mode	User mode	You are required to select a user in the Owner field.
Mixed mode	Book mode	You are required to select a primary custom book in the Book field.

In addition, if the owner of an existing record is removed from the record when the record is updated after the record ownership mode for the record type changes from user mode to another mode, then the following happens:

- If the record type supports teams, then all of the members of the team, except the former owner of the record, remain as members of the team. The behaviour is the same for team members who are members of a predefined group; that is, all of the members of the group, except the former owner of the record, remain as members of the team. However, the Account record type is an exception to this rule. If the former owner of an account is a member of a predefined group, then all of the members of the group are removed from the team. Any team members who are not members of the predefined group remain as members of the team, as is the case with other record types.

  NOTE: In the standard application, the former owner of the record is not retained as a member of the team, as described here. However, your administrator can configure the record type so that the former owner of the record is retained as a member of the team on the record. For information about configuring a record type to retain the former owner as a member of the team, see Customising Previous Ownership for Shared Records.

- If an activity that previously had an owner is updated and the owner field is cleared, then the activity no longer appears in the calendar of the former owner. However, the activity appears in the lists of related activities that users access from record Detail pages. Any user, including the former owner of the record, who has access to the record through book membership sees the activity in the related list of open or completed activities as appropriate.

About the Layouts of New Record Pages

In the standard application, the field layout on the page where you enter the information for a new record is the same as the field layout on the Detail page for the record type. However, you might see a different layout, depending on how your user role is set up. The layout that you see when you create a record is determined by the following features:

■ **Custom layouts for new record pages.** Your administrator can create a custom layout that is used specifically for the page where you enter the information for a new record of a given record type, and then assign that layout to your role. Typically, a custom layout for a new record page contains fewer fields than the Detail page layout for the record type.

In addition, your administrator can specify that the custom layout for the new record page is used only when you create a record through the Action bar (or through the global header, if you use a modern theme). If your administrator selects this option on your role, then the following happens:

■ The custom layout for the new record page is used in the form that opens when you create a record through the Action bar.

■ The field layout of the Detail page is used in the new record page that opens when you create a record from any other area in Oracle CRM On Demand, such as when you open the new record page by clicking the New button on a Homepage, List page, or Detail page.

NOTE: When a custom layout is used for the new record page, an Advanced link is available on the page to allow you to switch to the full layout of the new record page.

■ **Personalised layouts.** If your user role allows you to personalise the field layout on record Detail pages, and if you personalise the field layout for the Detail page for a record type, then your personalised field layout is also used in the page where you enter information for a new record, unless a custom layout is assigned to your role for the new record page. If a custom layout is assigned to your user role for the new record page, then the custom layout is used instead of your personalised layout. An Advanced link is available on the page to allow you to switch to your personalised layout for the page. For information about personalising your page layouts, see Changing Your Detail Page Layout (on page 855).

NOTE: You cannot personalise the field layout of a custom layout for a new record page.

Creating Records

You can create a record from different areas within the application. The area you choose depends on whether you want to:

■ Create the record in a pop-up window that is independent of the records on which you are working. You will not lose your place in the main area of the application.

■ Create the record by clicking the New button on the Homepage, List or Detail page. Each of the following pages opens the same form as the other methods, but it shifts the focus from your current page to the Edit page. You will need to use the Back link to return to the page on which you were working.

■ Create the record for a different record type that is automatically linked to the record on which you are currently working.

You can also create new records in the following ways:

■ By importing records:

■ Using the Import Assistant to import records from external, comma-separated value (CSV) files if your user role has the Personal Import privilege

■ Using the Oracle Data Loader On Demand client utility

■ Using Web services to synchronise records with other applications

The type of record you can import depends on the privileges assigned to your user role. For more information on how to import records from external CSV files and other external sources, see Import and Export Tools.

■ By converting lead records. Based on the options that you select on the Convert Lead page, you can create one or more of the following by converting a lead record:

   ■ An account record

   ■ A contact record

   ■ An opportunity record

   For more information about converting leads, see Converting Leads to Accounts, Contacts, Deal Registrations, or Opportunities (on page 250).

■ By converting deal registration records. Based on the options that you select on the Convert Deal Registration page, you can create one or more of the following by converting a deal registration record:

   ■ An account record

   ■ A contact record

   ■ An opportunity record

   For more information about converting deal registrations, see Converting Deal Registrations to Accounts, Contacts, or Opportunities (on page 502)

TIP: To prevent record duplication, search for the record before creating a new one, see Finding Records (on page 68).

NOTE: An asterisk (*) beside a field name indicates that this is a required field. Also, if a custom layout is assigned to your role for the new record page for the record type, then the page that opens when you create a record might include fewer fields than are available in the full page layout for the record type. If you want to enter information for additional fields, then you can open the full page by clicking the Advanced link in the new record page. The Advanced link is available in the new record page only if a custom layout is assigned to your role for the new record page for the record type. For more information about the field layout on new record pages, see About the Layouts of New Record Pages (on page 50).

To create a record using the Create section

1 In the Action bar, expand the Create section if necessary.

2 Click the record type that you want to create.

3 In the New record form, fill in the record information.

4 Save the record, by clicking either Save or Save and Continue:

   ■ If you click Save, then Oracle CRM On Demand saves the new record and closes the new record form.

   ■ If you click Save and Continue, then Oracle CRM On Demand saves the new record and navigates you to the new record's Detail page so that you can associate additional content to the record, for example, notes and attachments.

To create a record from the Homepage, List or Detail page

1 From any of the following pages, click the New button on the title bar.

2 On the Edit page, fill in the record information.

3 Save the record.

To create a record that is linked to the selected record

1 Select the record.

For instructions on selecting a record, see Finding Records (on page 68).

2 On the record Detail page, scroll to the appropriate section.

3 On the title bar for that section, click the New or Add button.

4 On the Edit page, fill in the record information.

5 Save the record.

Entering Information in Records

When you create records, you can enter information directly into some fields, or select values from a drop-down list. In addition, for some fields you can click an icon to the right of the field to display a window from which you can select values or enter values. The icons that you can click are as follows:

- **Phone icon**. Allows you to enter the details of a telephone number.
- **Calendar icon**. Allows you to select a date.
- **Currency icon**. Allows you to search for, and select a currency.
- **Lookup icon (magnifying glass)**. Allows you to search for, and select a record or multiple records, which will be associated with the record that you are creating. The Lookup icon is also used for selecting values for multi-select picklist fields.

About Picklist Fields and Picklist Value Groups

In picklist fields, you can select a value from a predefined list of values. If your company uses picklist value groups, then your company can limit the values that are available in a picklist field to a subset of the values that are defined for the field in certain cases. For more information about picklist fields and picklist value groups, see About Picklist Fields, Picklist Value Groups, and Divisions (on page 60).

About Multi-select Picklists

A multi-select picklist is a picklist from which you can select multiple values. When you click the Lookup icon for a multi-select picklist, a pop-up window appears, which allows you to select the required values by moving values from an Available list to a Selected list. You can move a value from one list to the other by

double-clicking the value, or by selecting the value and using the left and right arrows to move it. You can also sort the values in the Selected list.

Multi-select picklists are supported for the following record types:

- Account
- Activity
- Contact
- Custom Object 01
- Custom Object 02
- Lead
- Opportunity
- Partner
- Service Request

About Phone Number Fields

Phone fields have a phone icon next to them. Clicking the icon opens the phone editor, where you can do the following:

- Select the country of the phone number.
- Enter the city or area code.
- Enter the local number.
- Enter an extension number if one exists.

When you save the phone number, Oracle CRM On Demand prefixes the phone number that you entered with both of the following:

- A plus symbol (+) to represent the international access code for dialling out of the country where you are located.

  For example, if the Locale setting on your user record is English - United States, the plus symbol represents the 011 international access code. If the Locale setting on your user record is French - France, the plus symbol represents the 00 international access code.

- The country calling code for the country that you selected for the phone number.

  For example, if you select Spain as the country for the phone number, Oracle CRM On Demand prefixes the phone number with 34, in addition to the plus symbol.

TIP: If you want to determine the country calling code for a country, you can click the phone icon, select the country, and save the information. The country code for the country is displayed in the Phone field.

The list of countries in the phone editor includes some dependencies, foreign territories, and regions of sovereign states. For example, the Isle of Man is a British crown dependency, and Aland Islands is a region of Finland. A dependency, foreign territory, or region can have the same country code as its sovereign state. In such cases, when you edit a phone number with that country code, the Country field in the phone editor shows the name of the sovereign state, even if the dependency, foreign territory, or region of the sovereign state was chosen when the number was originally entered.

For example, you might select Aland Islands in the Country field in the phone editor when you first enter a phone number. Oracle CRM On Demand automatically prefixes that phone number with 358, in addition to the plus symbol. If you click the phone icon later to edit the phone number, then Finland appears in the Country field in the phone editor.

About Conditionally Required Fields

Your administrator can configure a field so that it is conditionally required, that is, the field is not required by default, but becomes required if the data in other fields on the record meets certain criteria. When this happens, a red asterisk (*) displays beside the field that is now a required field, and if the text label is displayed for the field, it is displayed in red text. If the field is blank, then you must update it before you save the record.

About the Automatic Conversion of Text to Links

If the text string that you enter in a field of the Text (Short) or Text (Long) field type starts with http:// or https://, then the text might be automatically converted to a link after the field value is saved. The Convert URL Text Values to Links check box on the company profile determines the behaviour of such text in these fields, as follows:

- If the check box on the company profile is selected, then the text is automatically converted to a link after the field value is saved.

- If the check box is not selected, then the text is not converted to a link.

About Address Fields

For addresses, the application displays different fields to accommodate country-specific information. For example, if you select Japan as the Country for an account's invoicing address, the other address fields change to those fields required for Japanese addresses, such as Chome, Ku and Shi/Gun.

In general, addresses are stored with the specific record type. However, some addresses are carried over when you link one record with another. For example, if you enter an invoicing and shipping address for an account, the invoicing address appears on the Contact Detail page when you link the account to the contact.

If your company administrator has added the Addresses section to your application, you can track additional addresses for such records as accounts and contacts. When tracking addresses for contacts, the primary address is always the one you entered in the Alternate address section.

Related Topics

See the following topics for related information:

- About Concatenated Fields (on page 56)

- About Fields Displayed as Images (on page 58)

- About Picklist Fields, Picklist Value Groups, and Divisions (on page 60)

- About Maskable Fields (on page 63)

- About Special Characters in Email Addresses (on page 64)

- About the Layouts of New Record Pages (on page 50)

About Concatenated Fields

A *concatenated field* is a field that can display the values from multiple fields and can also display additional text. Your administrator can set up concatenated fields for most record types. For example, your administrator might set up a concatenated field called Profile on the Contact record type to show the value of the Job Title field and the Age field in the following format:

Job Title, aged *Age*

Your administrator can then add the field to the Detail page layout for the Contact record type. If a contact's job title is Manager and the contact is aged 41, then the Profile concatenated field for the contact shows the following:

Manager, aged 41

If you have the necessary permission to edit the fields that appear within a concatenated field, then you can edit the fields through the concatenated field. In the example described earlier, you can change the job title of the contact by editing the concatenated field, but you cannot change the age of the contact. The age of the contact is calculated from the date of birth on the contact's record, and the Age field is not an editable field.

The concatenated fields can appear on record Detail pages and Edit pages, on List pages, and in related information sections. However, you cannot use the concatenated fields as search fields or as filter fields for lists. Depending on how your user role is set up, you might be able to use the fields within the concatenated fields as search fields and as filter fields for lists.

Related Topics

See the following topics for related information:

- Considerations When Editing Fields in a Concatenated Field (on page 56)
- Editing Fields in a Concatenated Field (on page 58)
- About Targeted Search (on page 68)
- Using Advanced Search (on page 82)
- Creating and Refining Lists (on page 118)

Considerations When Editing Fields in a Concatenated Field

The following considerations apply when you edit the fields within a concatenated field:

- If your administrator specifies a field as read-only for the record type or in the Detail page layout, then you cannot edit that field within a concatenated field.
- If your administrator specifies that a field is required, then that field must have a value when it is part of a concatenated field.
- Any field validation rules that apply to a field continue to apply to the field when it is part of a concatenated field.

◼ If your update to a field within a concatenated field fails the validation rules for the field, then none of your changes to the fields are saved. In other words, either all of your changes in the edit window are saved or none of them are saved.

◼ When you edit a concatenated field on a record Edit page, your changes are not saved when you click Save to close the edit window for the concatenated field. Your changes to the fields within the concatenated field are saved when you save the record.

◼ Smart associations are not supported in fields within concatenated fields. If a concatenated field includes a field that allows you to associate a record with the record you are working with, then you must click the Lookup icon to open the Lookup window where you can search for the record that you want. For information about smart associations, see About Smart Associations and the Auto-Resolve Functionality (on page 92).

◼ You cannot edit any of the additional text that your administrator specifies within a concatenated field.

About Address Fields in Concatenated Fields

Your administrator can include fields from addresses in a concatenated field. When you edit a concatenated field that includes a field from an address, the following considerations apply:

◼ If an address field in a concatenated field is from a shared address on an account, contact, dealer, or partner record, then you cannot edit the fields within the address. Instead, you can select a different address.

◼ If the field is from an address that is not a shared address, then the following considerations apply:

◼ You can edit all of the fields within the address.

For example, if the Billing City field is included in a concatenated field, then you can edit all of the fields within the billing address template for the relevant country. If the concatenated field also includes a field from another address, such as the Shipping City field from the shipping address, then you can also edit all of the fields within the template for that address for the relevant country.

◼ If you select a different country for the address, then the labels of the other fields within the address template change accordingly.

NOTE: If the concatenated field includes an address field that is not part of the address template for the country in the address on the record, then the field is blank within the concatenated field. In this case, when you edit the concatenated field, you can edit the fields that make up the address template for the address on the record. However, you cannot edit the field that is part of the concatenated field unless you change the country in the address and the address template for the new country includes the field.

Related Topics

See the following topics for related information:

◼ About Concatenated Fields (on page 56)

◼ Editing Fields in a Concatenated Field (on page 58)

Editing Fields in a Concatenated Field

This topic describes how to edit the fields in a concatenated field.

To edit the fields in a concatenated field using the inline edit functionality

1 Click the concatenated field to open the edit window.

2 In the edit window, edit the individual fields that appear in the concatenated field.

3 Save your changes.

Editing the Fields in a Concatenated Field in a Record Edit Page

The following procedure describes how to edit the fields in a concatenated field in a record Edit page.

To edit the fields in a concatenated field in a record Edit page

1 Click the edit icon (pencil) for the concatenated field to open the edit window.

2 In the edit window, edit the individual fields that appear in the concatenated field.

3 Save your changes.

4 When you finish editing the record, save your changes.

NOTE: When you edit a concatenated field on a record Edit page, your changes are not saved when you click Save to close the edit window for the concatenated field. Your changes to the fields within the concatenated field are saved when you save the record.

Related Topics

See the following topics for related information:

■ Considerations When Editing Fields in a Concatenated Field (on page 56)

■ About Concatenated Fields (on page 56)

About Fields Displayed as Images

In the following types of fields, the field value is displayed as an image and stored as an integer:

■ **Star-rating integer fields.** In a star-rating integer field, the field value is displayed as an image of five stars. Your company can use the star-rating fields in various ways to meet its business needs. For example, your company might use a star-rating field on opportunity records to indicate the estimated value of the opportunities. In a star-rating field, you select the stars to increase the rating and deselect

the stars to reduce the rating. If no star is selected, then no rating applies. One selected star is the lowest rating, and five selected stars are the highest rating.

The field value is stored as an integer, as follows:

■ When no star is selected, then the field is null, that is, it has no stored value.

■ When one star is selected, the stored value is 1. When two stars are selected, the stored value is 2, and so on.

TIP: If a star rating is set and you want to clear the star rating so that the field has a null value, then edit the field and click immediately to the left of the first star in the rating field to clear the rating.

■ **Stoplight integer fields.** In a stoplight integer field, the field value is displayed as a horizontal stoplight. When you select the first light it is red, when you select the second light it is amber, and when you select the third light it is green. Your company can use the stoplight fields in various ways to meet its business needs. For example, your company might use a stoplight field on task records to indicate how close the due date for the task is, as follows:

■ A green status might indicate that the due date is five days or more from today.

■ An amber status might indicate that the due date is fewer than five days from today.

■ A red status might indicate that the due date is in the past, that is, the task is overdue.

At most, only one of the lights in a stoplight field can be selected at any time, and the field can have no light selected.

The field value is stored as an integer, as follows:

■ If no light is selected, then the field is null, that is, it has no stored value.

■ When the red light is selected, the stored value is zero (0).

■ When the amber light is selected, the stored value is 1.

■ When the green light is selected, the stored value is 2.

TIP: If a light is selected and you want to reset the field so that no light is selected and the field has a null value, then edit the field and click the light that is currently selected. The light is then deselected, and the field has a null value.

About Star Rating and Stoplight Fields in Search and List Criteria

You can use star rating and stoplight fields as filter fields for lists, and your administrator can also add these fields to the search layout for the record type. However, to specify the value that you want to search for, you must enter the integer value of the field. For example, if you want to find records that are not rated, then use the Is NULL condition in the rating field to search for the records. If you want to find records that have a green setting in a stoplight field, then search for records where the value in the stoplight field is equal to 2.

About Editing Star Rating and Stoplight Fields

You can edit star rating and stoplight fields in record Edit pages, and you can also edit them inline in record Detail pages and List pages. If a star-rating field is included in the displayed columns in a list, then the star image appears in the field for a record if at least one star is selected in the field in that record. However, if no

stars are selected in the field, then the image does not appear in the field in the list, but you can update the field inline on the List page to select stars.

Similarly, if a stoplight field is included in the displayed columns in a list, then the stoplight image appears in the field for a record if a light is selected in the field in that record. However, if no light is selected in the field, then the image does not appear in the field in the list, but you can update the field inline on the List page to select a light.

Record Types That Support Star Rating and Stoplight Fields

The following record types support star rating and stoplight fields:

- Account
- Activity
- Contact
- Lead
- Opportunity
- Solution

NOTE: The star-rating and stoplight fields are supported by the various application programming languages (API) that can be used with Oracle CRM On Demand.

About Picklist Fields, Picklist Value Groups, and Divisions

For many record types, your company can limit the values that are available in a picklist field to a subset of the values that are defined for the field. To limit the selections in picklist fields, your administrator sets up picklist value groups and links the values in the picklist fields to the picklist value groups. Picklist value groups can control one or more picklist fields on one or more record types. Your administrator can add the Picklist Value Group field to the page layout for a record type. This field allows you to select a picklist value group. Then, in any picklist field that is controlled by the picklist value group that is selected on the record, only the values that are linked to the picklist value group appear in the picklist.

For example, assume that your company has three call centres that use Oracle CRM On Demand. Depending on the location of a call centre and the products that the call centre services, some of the values in a number of picklist fields in service requests are not valid selections for users in the various call centres. To help users to select values that are appropriate for their call centre, your administrator sets up three picklist value groups; that is, one picklist value group for each call centre. The administrator then links a subset of the values for each of the relevant picklist fields to each of the picklist value groups, and adds the Picklist Value Group field to the page layout for the Service Request record type. When a user in a call centre creates a service request, the user can select the appropriate picklist value group for that call centre in the Picklist Value Group field on the service request. Then, the choices in the picklist fields on the record are limited to the values that are appropriate for the call centre.

About Picklist Value Groups and Divisions

If your company uses the Division record type to organise users into subgroups for business purposes, then your user record might be associated with one or more divisions, one of which is specified as your primary division. Each division can be associated with a picklist value group. In such a setup, when you create a record, the record is automatically associated with your primary division and with the picklist value group that is associated with the division. For a list of the record types in which divisions and picklist value groups can be used, see Record Types That Support Picklist Value Groups and Divisions.

NOTE: Your administrator can configure divisions and picklist value groups to meet the business needs of your company. Your administrator can also rename the Division record type and can rename the Division field and the Picklist Value Group field on any record type where the fields are available.

Picklist Value Groups and Divisions Setup

If your company uses picklist value groups, then the following setup applies:

- Your administrator sets up the picklist value groups.

- Your administrator links the picklist values for various fields to the picklist value groups.

- Your administrator adds the Picklist Value Group field to the page layouts that are assigned to your user role for certain record types.

If your company also uses the Division record type, then the following setup also applies:

- Your administrator specifies which users are associated with each division.

- Your administrator specifies which picklist value group, if any, is associated with each division.

- Your administrator can add the Division field to the page layouts that are assigned to your user role for certain record types.

Behaviour of the Division and Picklist Value Group Fields When Creating and Editing Records

If your company uses picklist value groups and divisions, then the behaviour that you see when creating and editing records is as follows:

- If your user record is associated with one or more divisions, then when you create a record, the following happens:

  - The Division field on the record is automatically populated with the name of your primary division.

  - If a picklist value group is associated with your primary division, then the Picklist Value Group field is automatically populated with the picklist value group for that division. If no picklist value group is associated with your primary division, then the Picklist Value Group field is not automatically populated.

- You can change or clear the value of the Division field on a new record of that type before you save the new record. You can also change or clear the value of the Division field on an existing record, provided that you have the necessary access rights to update the record. After you change the value of the Division field, the value of the Picklist Value Group field on the record might also change automatically, as follows:

  - If the picklist value group for the new division is the same as the picklist value group that is assigned to the former division, then the value in the Picklist Value Group field does not change.

- If the picklist value group for the new division is different from the picklist value group that is assigned to the former division, then the value in the Picklist Value Group field changes to the picklist value group for the new division.

- If you clear the value from the Division field, then the value in the Picklist Value Group field is automatically cleared.

  NOTE: Your administrator can set up the Division field as a read-only field, in which case you cannot change or clear the value in the field.

- You can change or clear the value of the Picklist Value Group field on a new record of that type before you save the new record. You can also change or clear the value of the Picklist Value Group field on an existing record, provided that you have the necessary access rights to update the record. The division on the record is not automatically changed when you change or clear the Picklist Value Group field.

  NOTE: Your administrator can set up the Picklist Value Group field as a read-only field. In that case, you cannot change or clear the value in the field.

If the owner of a record changes after a value is saved in the Division field on the record, then the values in the Division field and Picklist Value Group fields are not automatically changed even if the new owner is not associated with the division on the record.

What Happens When the Picklist Value Group on a Record Changes

When the picklist value group on a record changes either because you select a new division that is associated with a different picklist value group or because you select a new picklist value group, any values that were previously selected in the picklist fields that are controlled by either the old picklist value group or the new picklist value group remain unchanged, even if the value that is selected in such a field is not linked to the new picklist value group. In such cases, you are not prompted to update the picklist value fields when you update other fields on the record. However, the next time that you edit a picklist field on the record, the following happens:

- If the picklist field is controlled by the new picklist value group, then only the values that are linked to the new picklist value group are available for selection. You can select a new value for the field, or you can cancel the edit operation to retain the existing value.

- If the picklist field is controlled by the old picklist value group but is not controlled by the new picklist value group, then all of the values are available for selection.

About Picklist Value Groups, Divisions, and Inline Edit

You cannot use the inline edit functionality to edit the Picklist Value Group field or the Division field on a record directly in a record Detail page or a record List page. To edit these fields, you must open the Edit page for the record.

About Picklist Value Groups and Divisions in Searches and List Filters

The following considerations apply to searches and list filters:

- Your administrator can add the Division field or the Picklist Value Group field or both to the search fields in the Action bar for record types that support divisions. You can then search for records by selecting a division or a picklist value group.

■ If the Division field is available as a search field or list filter, then you can select any division as part of the criteria for the search or list filter. You are not limited to selecting only the divisions with which you are associated. Similarly, if the User field is also available as a search field or list filter and you select a user as part of your criteria, then you are not limited to selecting only the divisions that are associated with that user.

■ If you select a division as part of the criteria for a search or list filter, then the picklist value group for that division is not automatically selected as part of your criteria, even if the Picklist Value Group field is one of the search fields for the record type.

■ If you use a picklist field that is controlled by picklist value groups as part of the criteria for a search or list filter, then you can select any of the values in the picklist field as a filter for the search or list. The available values in the picklist field are not limited to the values that are linked to a specific picklist value group, even if you select a picklist value group as part of your criteria.

■ You cannot search for division records or picklist value group records.

What Happens if Divisions are Merged or Deleted

Your administrator can delete a division or merge two or more divisions into one division. For information about what happens when divisions are merged or deleted, see About Merging Divisions and Deleting Divisions.

Related Topics

See the following topic for additional information:

■ About Divisions and Picklist Value Groups on Records

About Maskable Fields

A maskable field is a field in which some of the data can be hidden from view from some users. In Oracle CRM On Demand, your administrator can set up some custom maskable fields for certain record types. Your user role determines the behaviour that you see for these custom maskable fields, as follows:

■ If your user role does not include the View Masked Data privilege:

    ■ In all of the places where a maskable field is displayed for you, such as the record Edit, Detail, and List pages, only the last four characters in the field are unmasked. All of the other characters in the field are represented by the characters XXXX.

    For example, if the field contains the value 102030456789, then you see the following:

    XXXX6789

    However, you can update the maskable field. After you update the field, all but the last four characters of the value remain masked.

    NOTE: If a default value is assigned to a maskable field, then the full default value is displayed in the field when you create a new record, even if your user role does not include the View Masked Data privilege.

- You cannot use a maskable field as a criterion to search for records or to filter lists. The maskable fields are not available to you in the Search section of the Action bar, the Advanced Search page, and in other areas where you can search for records and filter lists. If you attempt to open a list that includes a maskable field as a search criterion, or to use a maskable field to filter a list, then an error message is displayed.

- You cannot use a maskable field to sort a list, even if the field is displayed in the list. If you attempt to use a maskable field to sort a list, then an error message is displayed.

- If your user role includes the View Masked Data privilege, then the maskable fields are available for you to view, update, and use in searches and lists in the same way as any other text field.

NOTE: Your administrator can set up a maskable field as read-only for the record type, or for a page layout. If a maskable field is set up as read-only for the record type, or for the page layout that is assigned to your role for the record type, then you cannot update the field. This is the case for all users, regardless of whether a user's role includes the View Masked Data privilege.

About Special Characters in Email Addresses

In the standard Oracle CRM On Demand application, you can use the following characters in the addresses in email fields:

- Uppercase and lowercase letters.

- The digits 0 through 9.

You can also use the following special characters, but only in the local part of the email address:

! # $ % & ' * + - / = ? ^ _ ` { | } ~

In addition, you can use the period character (.) in email addresses, but you cannot use consecutive periods. For example, the following are not valid:

- isa..mple@riqhtequip

- isample@riqhtequip..com

If your administrator selects the Allow Unicode Characters in Email Fields check box on the company profile, then you can use most Unicode (UTF-8) characters, including accented letters, in the address in the Email field on the Contact and Lead record types only. You can use the Unicode (UTF-8) characters in both the local and domain parts of these email addresses, although consecutive periods are still not allowed. In addition, the following characters are not allowed, even if the Allow Unicode Characters in Email Fields check box is selected on the company profile:

, ( ) [ ] : ; " < >

The following considerations apply when using email addresses that include special characters that are not supported in the standard Oracle CRM On Demand application:

- When you click an email address link in Oracle CRM On Demand to send an email, the email opens in your default email client. Your email client determines whether the email can be sent to the address. Similarly, when you click Send Email in the Appointment Detail page to send an email to the contacts on the appointment, your email client determines whether the email can be sent to the addresses of the contacts.

- The following applications do not support the full set of Unicode (UTF-8) characters in email addresses:

■ Oracle Outlook Email Integration On Demand

■ Oracle Notes Email Integration On Demand

■ Oracle CRM On Demand Disconnected Mobile Sales

■ Oracle CRM On Demand Connected Mobile Sales

These applications support the set of characters that are supported for use in the standard Oracle CRM On Demand application. Any email addresses that include other special characters might not be recognised or displayed correctly in these applications.

■ In workflow Send Email actions, if an expression in the To field of the workflow action returns an email address that contains any character that is not supported for use in email addresses in the standard application, then Oracle CRM On Demand cannot send email to that address, even if the Allow Unicode Characters in Email Fields check box is selected on the company profile.

For more information about the email address formats that are considered valid and invalid, see Field Type Guidelines for Importing Data.

Displaying Images on Record Detail Pages

For certain record types, your company administrator can specify that an image can be displayed on the record Detail pages. If your administrator specifies that an image can be displayed on a record Detail page, then a placeholder for an image appears at the top left of the Detail page, and you can upload the image that you want to display. You cannot change the location of the image on the page.

The ability to display an image on a record Detail page is available for the following record types:

■ Account

■ Contact

■ Product

You can upload images files of the following file types:

■ .jpg

■ .jpeg

■ .png

■ .gif

■ .bmp

The file that you upload must be less than 5 megabytes (MB). The maximum height of the displayed image is 150 pixels, and the maximum width is 150 pixels. If the image that you upload exceeds the maximum height or width, then the image is automatically resized before the image file is saved in Oracle CRM On Demand. The ratio of the height to the width is maintained. For example, if you upload an image that is 1500 pixels high and 1000 pixels wide, then the image is automatically resized to be 150 pixels high and 100 pixels wide. If the image that you upload is smaller than the maximum height and width, then the image is not resized.

The following procedure describes how to upload an image to be displayed on a record Detail page. You cannot upload an image to a record while creating a record. You must first create the record and save it, and

then upload the image to the record. You can upload an image to an existing record provided that you have the necessary access rights to update the record.

NOTE: If an image was previously displayed on the record, then the image that you upload replaces the image that was previously displayed. The image file that was previously displayed is deleted from Oracle CRM On Demand, and you cannot restore it.

To upload an image to a record Detail page

1 In the record Detail page, rest your pointer on the image placeholder so that the image menu displays, and then click Menu.

2 Click Choose File to open a dialog box where you can select a file.

3 Browse to the file that you want to upload and select it.

The image that you selected is displayed in the image field.

The following procedure describes how to remove an image from a record Detail page.

NOTE: When you remove an image from a Detail page, the image file is deleted from Oracle CRM On Demand, and you cannot restore it.

To remove an image from a record Detail page

1 In the record Detail page, rest your pointer on the image to display the image menu, and click Remove.

2 Confirm that you want to remove the image file.

About the Enhanced View for Related Information Tabs

At the bottom of a record Detail page, you can access related information sections that contain lists of records that are linked to the main record. In the standard application, each related information section on the Detail page shows up to five records of one record type, but if you want to see more records, or perform list actions such as filtering or sorting, then you must open the full list of related records by clicking the Show Full List link.

However, if the related information sections on your record Detail pages appear as tabs, and if the Enable Enhanced View for Tabs check box is selected on the company profile, then you can perform the following additional actions in the related information sections on record Detail pages:

■ In the Number of records displayed field at the bottom of the related information section, select a number of records to see at once in the related information section. You can choose to see 5, 10, 25, 50, 75, or 100 records in the section at one time. After you change the number of records displayed in a related information section, the new setting applies to all related information sections that support the enhanced functionality on all record Detail pages, and the setting is maintained until you change it again.

NOTE: The number of records that you choose to display in the lists in related information sections is independent of the number of records that you choose to display in the main List pages for the record

types, and is also independent of the number of records that you choose to display in the List pages that open when you click the Show Full List link in the related information sections.

■ If there are more records in the list than can be shown in the current page, move to the next page, previous page, first page, or last page in the list, by clicking the navigation icons at the top or bottom of the related information section.

■ Sort the list by clicking a column heading, if the field is supported for sorting for the current list.

■ Filter the list. For information about filtering lists, see Filtering Lists (on page 123).

The list page that you display, and the sort order and filters that you apply in the related information section, remain active when you do the following:

■ Open a different related information section on the page and then open the original related information section again.

■ Edit a field inline in the related information section.

■ Edit a field inline in the parent record. However, if you change the driving picklist field for a dynamic layout, and the page layout changes as a result, then the first page of the list is shown, and the sort order and filters return to the default sort order and filter for the list.

■ Open the full list of related records by clicking Show Full List.

In this case, although the sort order and filters that you apply in the related information section also apply in the full list page, the first page of the list is displayed, even if you had a different page of the list open in the related information section on the record Detail page. Also, when you return to the parent record Detail page from the full list of related records, the sort order and any filters that you applied to the list are cleared, and the first page of the list is displayed again.

NOTE: If your user role has the Personalise Detail Page - Records Indicator privilege, then you can set up the related information sections so that graphical indicators appear on the tabs for the related information sections to indicate whether any records are present in the sections. These record indicators are not updated dynamically to reflect any filters that you apply to the list of related records. If you open a related information section that contains records, and if you then apply a filter to the related records so that no records are shown in the section, then the record indicator for that tab continues to indicate that the related information section contains records. And, if you open a different tab and then open the original tab again, the filter still applies and no records are displayed. However, the record indicator for the tab continues to indicate that the related information section contains records. For information about setting up record indicators, see Managing Record Indicators for Related Information Sections (on page 863).

The sort order and any filters that you apply in a related information section are cleared, and the first page of the list is displayed again, when you perform any of the following actions:

■ Navigate away from the parent record Detail page through any action other than clicking Show Full List. Clicking New to add a new record of the parent record type, or clicking Edit to update the parent record in a separate page, are examples of actions that navigate away from the parent record Detail page.

■ Return to the parent record Detail page from the full list of related records.

■ Click Add or New in the related information section, to link a record to the parent record.

■ Click the Edit, Remove, or Delete link for a record in the related information section.

NOTE: The enhanced functionality described in this topic is not available if the related information sections on record Detail pages are displayed as lists rather than as tabs. In addition, some lists of linked records do not

support the enhanced functionality described in this topic, even if the related information sections are displayed as tabs and the Enable Enhanced View for Tabs check box is selected on the company profile.

Finding Records

You can find records in several ways in Oracle CRM On Demand:

- Searching for Records in the Action Bar (on page 81)
- Using Advanced Search (on page 82)
- Finding Records in List Pages (on page 87)
- Searching for Records in Lookup Windows (on page 88)
- Finding Records Using Enhanced Keyword Search (on page 94)

Related Topics

See the following topics for related information about searching for records:

- About Targeted Search (on page 68)
- About Filter Conditions (on page 71)
- About Filter Values (on page 77)
- About Searching on Multi-Select Picklists (on page 78)
- About Keyword Search (on page 78)
- Default Search Fields for Keyword Search (on page 79)
- About Smart Associations and the Auto-Resolve Functionality (on page 92)
- Using the Book Selector (on page 93)
- About Enhanced Keyword Search (on page 96)

About Targeted Search

You can perform two types of search in Oracle CRM On Demand: targeted search and keyword search. Your company administrator determines which type of search is used by default for your company, by selecting the search type on the company profile page. Targeted search is the recommended search type. For information about keyword search, see About Keyword Search (on page 78).

You can use targeted search in several places in Oracle CRM On Demand, as follows:

- **The Search section of the Action bar.** Depending on the type of search that your company administrator selects for your company, either keyword search or targeted search is used in the Search section of the Action bar for your company. For more information about searching for records in the Action bar, see Searching for Records in the Action Bar (on page 81).
- **Lookup windows.** Depending on the type of search that your company administrator selects for your company, either keyword search or targeted search is used in the Lookup windows where you search for

records to link to the record that you are working with. For more information about searching for records in Lookup windows, see Searching for Records in Lookup Windows (on page 88).

■ **The Advanced Search page in Oracle CRM On Demand.** In the Advanced Search page, the type of search depends on the options that you select, as follows:

■ If you search multiple record types, then the search is a keyword search.

■ If you search a single record type, then the search is a targeted search.

For more information about using advanced search, see Using Advanced Search (on page 82).

■ **Quick Filter fields in List pages.** Searches using the Quick Filter fields in List pages are always targeted searches even if keyword search is selected as the default search type for your company.

For targeted searches, your user role determines which record types you can search and which fields you can search on each record type, as follows:

■ If your company administrator does not make any search fields available in the search layout that is assigned to your user role for a record type, then the following happens:

■ You cannot search for records of that type in the Search section of the Action bar.

■ You cannot specify any search criteria for an advanced search of that record type. Running an advanced search without any search criteria returns all of the records of that record type that your user role and access settings allow you to see.

■ You cannot use the Quick Filter fields in Lookup windows.

■ You cannot specify any search criteria for a list of records of that record type. For more information about creating and refining lists, see Creating and Refining Lists (on page 118).

■ For any record type, you might see multiple search fields in the Search section of the Action bar and in the Quick Filter fields in Lookup windows, depending on which fields your company administrator makes available in the search layout that is assigned to your user role for the record type.

■ If the All Fields in Search and Lists privilege is enabled for your user role, then you can search all of the fields that your company administrator makes available in the search layout that is assigned to your user role for the record type, in any of the following places:

■ Action bar

■ Lookup windows

■ Advanced search

NOTE: It is recommended that company administrators do not enable the All Fields in Search and Lists privilege for most user roles. When the privilege is not enabled, fields that your company does not use are not visible in search and list pages. This reduces clutter and makes it easier for users to see the fields that they are most interested in.

■ If the All Fields in Search and Lists privilege is not enabled for your user role, then you can search a field in the Action bar, Lookup windows, or advanced search, only if the field meets both of the following criteria:

■ The field is available in the search layout that is assigned to your user role for the record type.

■ The field is displayed on the Detail page layout that is assigned to your user role for that record type. If dynamic page layouts are defined for your role, then the field must be displayed on at least one of the dynamic page layouts.

NOTE: *Dynamic layouts* are page layouts that show different sets of fields for different records of the same record type, depending on the picklist value that you select in a certain field on the record.

Targeted search returns records where the values that you specify in the search fields match the corresponding values in records of the record type that you selected. It displays only those records where a match is found for each of the values you entered, which is equivalent to using an AND condition between the search fields. If you leave a search field blank, then that field is not considered in the search. However, if a check box field is present in the search layout, then the value of the check box field is always included as part of the search criteria. If you select the check box, then Oracle CRM On Demand interprets the check box value as True or Yes. If you deselect the check box, then Oracle CRM On Demand interprets the check box value as False or No.

The search layout that is assigned to your user role for a record type determines which fields display as columns in the list of records returned by a search of that record type.

NOTE: You cannot specify a null value in a field in a search from the Action bar. To specify a null value, you must use Advanced Search. For more information, see Using Advanced Search (on page 82).

About Wildcards in Targeted Search

By default, every search value entered in a targeted search field is appended with a wildcard or asterisk (*) so you do not need to append a wildcard to your search string. You can prefix your search values with a wildcard, or you can use a wildcard between the search values. You cannot use the wildcard in picklists where values are predetermined. For example, in a targeted search of account records, the default search layout allows you to enter search strings for the Account Name field and the Location field. Both of these fields are case-insensitive. If you enter *C* in the Account Name field and *Head* in the Location field, then the targeted search expression is interpreted as follows:

Show all accounts where Account Name is like *C** and Location is like *Head**

The search returns all accounts where the account name starts with the letter *C* (uppercase and lowercase) and where the value in the Location field begins with the word *Head* (any mixture of uppercase and lowercase).

NOTE: Using the wildcard affects search performance. Searches where a search value is prefixed with a wildcard are the slowest.

The use of wildcards is restricted when you search for exact matches as described in the following section.

About Searching for Exact Matches

If you know the exact value in a field on the record that you are searching, then you can search for exact matches by prefixing the search string with an equal sign (=). When you prefix a search string with an equal sign, targeted search behaves as follows:

■ A wildcard is not appended to the end of the search string.

If the search field is a case-sensitive field, then the search returns exact matches for the search string. If the search field is a case-insensitive field, then the search returns matches including mixed-case matches.

For example, if you enter *=Acme* as the search value in the Account Name field, the search returns all account records where the account name is *Acme* or *ACME*, or other mixed-case variations, because Account Name is a case-insensitive field. The search does not return any record where the account

name contains the word *Acme* but also contains other characters, for example, *Acme Inc.*, *Acme Incorporated*, or *Acme SuperStore*.

■ If you explicitly use a wildcard in the search string, then the wildcard is treated as text.

For example, assume that there are two account records with the account names: *Acme** and *Acme Super Store*. If you enter *=Acme** in the Account Name search field, then the search returns the record where the account name is *Acme**. The search does not return the record where the account name is *Acme Super Store*.

■ If the field value in a record starts with an equal sign, then only the second equal sign that you enter in the search field is treated as part of the search string.

For example, assume that there are two account records with the account names: *=Acme Super Store* and *Acme Super Store*. If you enter *==Acme Super Store* in the Account Name field, then the search returns the record where the account name is *=Acme Super Store*. The search does not return the record where the account name is *Acme Super Store*.

The following restrictions apply to the use of the equal sign as a prefix:

■ The prefixed equal sign is not supported for search fields of the Phone field type.

■ You cannot prefix a value in a picklist search field with the equal sign.

About Filter Conditions

For searches, different filter conditions are available depending on the data type of the search field, as shown in the following table.

NOTE: In some cases, a search does not return records that have a null value in a field that you use in the criteria for a search or list filter. For example, if you search for opportunities that have a status that is not equal to Won, then opportunities that have a null status are not returned. If you want your search to return records that have a null value in a field, then include an Is NULL condition for that field. In the example used earlier, if you want your search to return opportunities that have a null status as well as opportunities that have a status other than Won, then include an Is Null condition for the status field in the search criteria, as well as the condition to find records that have a status that is not equal to Won.

Data Type	Filter Conditions Available
Number, Integer, Percent, Currency	■ Between ■ Equal to ■ Greater than ■ Less than ■ Is NULL ■ Is not NULL ■ Not equal to ■ Not Between

Data Type	Filter Conditions Available
Date, Time	■ Between
	■ Equal to
	■ In the last 90 days
	■ In the next 90 days
	■ On
	■ On or after
	■ On or before
	■ Today *
	■ Yesterday*
	■ Tomorrow*
	■ In the last ? day
	■ In the next ? day
	■ Last Week*
	■ Next Week*
	■ This Week*
	■ Last Month*
	■ Next Month*
	■ This Month*
	■ This Quarter*
	■ Last Quarter*
	■ Next Quarter*
	■ This Year*
	■ Next Year*
	■ Last Year*
	■ Is NULL*
	■ Is Not NULL*
	■ Not equal to
	■ Not Between
	For conditions marked with an asterisk (*), the value field is disabled when the condition is selected.
	For the condition In the last ? day, and In the next ? day, the variable ? is substituted with a number of

Data Type	Filter Conditions Available
	days selected in the filter value field.
Checkbox	▪ Is checked
	▪ Is not checked
Picklist	▪ Contains all values
	▪ Contains at least one value
	▪ Contains none of the values
	▪ Equal to
	▪ Equals any*
	▪ Is NULL

Data Type	Filter Conditions Available
	■ Is not NULL ■ Not equal to ■ Between* ■ Greater than* ■ Less than* For information about the conditions marked with an asterisk (*), see the About Filter Conditions for Picklist Fields section of this topic.
Text	■ Between ■ Contains all values ■ Contains at least one value ■ Contains none of the values ■ Equal to ■ Greater than ■ Less than ■ Is NULL ■ Is not NULL ■ Not equal to ■ Begins with ■ Does not begin with ■ Is Like ■ Is not Like ■ Not Between
Phone	■ Begins with ■ Between ■ Contains all values ■ Contains at least one value ■ Contains none of the values ■ Equal to ■ Greater than ■ Less than ■ Not equal to

About Filter Conditions for Picklist Fields

For the Between, Greater than, and Less than conditions for picklist fields, Oracle CRM On Demand searches the language independent codes (LICs) of the picklist values and not the picklist values themselves, to find the records that meet the filter criterion that you specify. So, your search results include all records in which the LIC of the picklist value meets the criterion, even if the picklist value itself does not. Similarly, your search results do not include records in which the picklist value meets the criterion, but the LIC of the picklist value does not.

For example, assume that your administrator creates a picklist value called Beta. The LIC for the new picklist value is the same as the picklist value by default. So, a search with the following filter returns records in which the picklist value is Beta:

Between Alpha, Gamma

However, if your administrator later changes the picklist value from Beta to Not Beta, then the LIC for the picklist value does not change. So, if you search for records using the filter shown above, then your search results include all records in which the picklist value is Not Beta, because the LIC for the picklist value is still Beta. However, if you search for records using the following filter, then your search results do not include records in which the picklist value is Not Beta, because the LIC for the picklist value does not meet the specified criterion:

Between Gamma, Zeta

Similarly, if you search for a translated version of a picklist value, then your search results include all records in which the LIC of the picklist value meets the specified criterion, even if the translated picklist value does not.

For conditions for picklist fields other than the Between, Greater than, and Less than conditions, Oracle CRM On Demand searches the picklist values themselves and not the LICs, to find the records that meet the filter criterion that you specify.

Equals Any Filter Condition

The Equals any filter condition searches for records that exactly match any one of the specified values. This filter condition is supported only for picklist fields for which the Lookup icon (magnifying glass) is available in record Detail pages and Edit pages. It is not supported for picklist fields for which a drop-down list of values is available in record Detail pages and Edit pages. For this type of picklist field, use the Contains all values filter condition to search for records that exactly match any one of the specified values.

In addition, the Equals any filter condition is not supported for multi-select picklist fields. For information about searching on multi-select picklist fields, see About Searching on Multi-Select Picklists .

How Filter Conditions Are Used

The following table shows how various filter conditions and operators are used:

Use This	With	To Match	For These Results
Between	Text, numbers or dates	Two values separated by commas	Displays records with values between A and B (excludes values equal to A and B).

Use This	With	To Match	For These Results
Contains all values (equal to)	Text, numbers or dates	Single or multiple values separated by commas	Displays records matching the exact values. The application does not retrieve substrings of the values, or the same value with different capitalisation (uppercase or lowercase).
Contains at least one value	Text only	Single or multiple values separated by commas	Displays records that partially match the values (allows sub string matching). For example, entering *Brown* retrieves records with *Browns Trucking*, *Browning Equipment*, and *Lester Brown Car Wash*. **NOTE:** This behaviour applies to filtered lists only, and not to other areas in Oracle CRM On Demand that use the condition, Contains At Least One Value. Also, using this condition affects the speed at which the records are retrieved, because Oracle CRM On Demand looks for partial matches.
Contains none of the values (not equal to)	Text, numbers or dates	Single or multiple values separated by commas	Displays records *not* matching the values. This is the inverse of *Contains all values*.
Equal to	Text, numbers or dates	Single value for each line. To add values, use the operator OR and add another line.	Displays records matching the values.
Equals any	Picklist	Single or multiple values separated by commas	Displays records that exactly match any one of the values. **NOTE:** For more information about the Equals any filter condition, see the About Filter Conditions for Picklist Fields section of this topic.
Greater than	Text, numbers or dates	Single value	Retrieves records with a value greater than the entered value.
Less than	Text, numbers or dates	Single value	Retrieves records containing a value that is less than the entered value.
Operator			

Use This	With	To Match	For These Results
AND	Text, numbers or dates	Two or more conditions	Displays records for which all given conditions are true. For example, entering Close Date > 10/01/2003 AND Revenue > 500000 will return records that match *both* criteria.
OR	Text, numbers or dates	Any condition	Displays records for which at least one condition is true. For example, entering Industry = Energy OR Invoicing County=KEN returns records that match *either* of these criteria.

About Filter Values

When you search for records, depending on the filter condition that you choose, you must enter a filter value.

When entering filter values for a search, follow these guidelines:

- Use commas to separate values in a list of values with any of the following conditions:

    - Contains all values

    - Contains at least one value

    - Contains none of the values

    - Equals any

- Do not use a comma within a value with any of the following conditions:

    - Contains all values

    - Contains at least one value

    - Contains none of the values

    - Equals any

    Commas are treated as separators in the list of values, and therefore cannot be used within the values themselves. If the values for the filter contain commas, use a combination of other conditions to create the filter that you want.

- For numeric values, do not use commas to indicate values in thousands.

- You can use partial words with the Contains at least one value condition. However, using partial words with the other conditions does not retrieve the records that you want.

    NOTE: This behaviour applies to filtered lists that use the Contains at least one value condition and not to other areas in Oracle CRM On Demand.

- For dates, enter them in the format that your company uses but include four digits for the year, such as 2003.

■ For currency, omit commas and symbols, such as the pound sign (£).

Using Wildcards with Filter Values

You can only use the wildcard characters (* and ?) when searching for text and phone fields where the filter condition is Begins with.

CAUTION: Using the asterisk character (*) might result in slow performance if used with large amounts of data.

You can use wildcards in the following types of search:

■ The Search Criteria section in Advanced Search

■ The Search Criteria section in the Create List and Refine List pages

■ Alpha Search on List pages

■ Quick Search on List pages

■ The Search section in the Action bar

For telephone number fields, you can, for example, search for all telephone numbers of a certain area code. To do this, click the phone icon, and in the Phone Number pop-up, enter the area code and then the asterisk (*) wildcard in the Local Number field.

About Searching on Multi-Select Picklists

You can search and query on all of the values of a multi-select picklist field. A *multi-select picklist* is a picklist from which you can select multiple values when entering record information.

Multi-select picklist fields are supported as columns in target search results and in target search filter criteria.

The following list shows how the multi-select picklist values in the filter criteria and the filter condition determine which records are found in the search:

■ **Contains all values**. A record is found if all the specified filter values match the multi-select picklist values of a searched record.

■ **Contains at least one value**. A record is found if any of the specified filter values match the multi-select picklist values of a searched record.

■ **Contains none of the values**. A record is found if none of the specified filter values match the multi-select picklist values of a searched record.

About Keyword Search

You can use two types of search in Oracle CRM On Demand: targeted search and keyword search. Your company administrator determines which type of search is used by default for your company, by selecting the search type on the company profile page. Targeted search is the recommended search type. For more information about targeted search, see About Targeted Search (on page 68).

You can use keyword search in several places in Oracle CRM On Demand, as follows:

■ **The Search section of the Action bar.** Depending on the type of search that your company administrator selects for your company, either keyword search or targeted search is used in the Search section of the Action bar for your company. For more information about searching for records in the Action bar, see Searching for Records in the Action Bar (on page 81).

■ **Lookup windows.** Depending on the type of search that your company administrator selects for your company, either keyword search or targeted search is used in the Lookup windows where you search for records to link to the record that you are working with. For more information about searching for records in Lookup windows, see Searching for Records in Lookup Windows (on page 88).

■ **The Advanced Search page in Oracle CRM On Demand.** In the Advanced Search page, the type of search depends on the options that you select, as follows:

   ■ If you search multiple record types, then the search is a keyword search.

   ■ If you search a single record type, then the search is a targeted search.

   For more information about using advanced search, see Using Advanced Search (on page 82).

NOTE: Searches using the Quick Filter fields in List pages are always targeted searches, even if keyword search is selected as the default search type for your company.

If your company administrator selects keyword search as the search type for your company, you see only one search field in the Search section in the Action bar and in Lookup windows. A keyword search searches certain fields to find matches to the text that you enter in the search field. It displays all records where the text string you entered is found in any of the searched fields, which is equivalent to using an OR condition in the default fields. For example, in a keyword search of service request records, the Service Number field and the Subject field are searched. If you enter the value *1234* in the Search field in the Action bar, the records displayed include the following:

■ All records where the value in the Service Number field includes the string *1234*, such as service requests number 12345 and 01234.

■ All records where the text in the Subject field includes the string *1234*, such as *Customer reported a problem with product number 1234.*

Some record types do not support keyword search. For a list of the record types that support keyword search and for details about the fields that are searched for each record type in a keyword search, see Default Search Fields for Keyword Search (on page 79).

Default Search Fields for Keyword Search

You can use keyword search in several places in Oracle CRM On Demand, as follows:

■ **The Search section of the Action bar.** Depending on the type of search that your company administrator selects for your company, either keyword search or targeted search is used in the Search section of the Action bar for your company. For more information about searching for records in the Action bar, see Searching for Records in the Action Bar (on page 81).

■ **Lookup windows.** Depending on the type of search that your company administrator selects for your company, either keyword search or targeted search is used in the Lookup windows where you search for records to link to the record that you are working with. For more information about searching for records in Lookup windows, see Searching for Records in Lookup Windows (on page 88).

■ **The Advanced Search page in Oracle CRM On Demand.** In the Advanced Search page, the type of search depends on the options that you select, as follows:

■ If you search multiple record types, then the search is a keyword search.

■ If you search a single record type, then the search is a targeted search.

For more information about using advanced search, see Using Advanced Search (on page 82).

NOTE: Searches using the Quick Filter fields in List pages are always targeted searches even if keyword search is selected as the default search type for your company.

For more information about keyword search and targeted search, see About Keyword Search (on page 78) and About Targeted Search (on page 68).

All record types support targeted search, but some record types do not support keyword search. The following table lists the record types that support keyword search. For each record type, the table shows the fields that Oracle CRM On Demand searches in a keyword search.

For this record type	The following fields are searched
Accounts	Account Name, Location
Appointments	Subject
Campaigns	Source Code, Campaign Name
Contacts	Last Name, First Name, Email
Custom Objects 01	Name, Quick Search 1, Quick Search 2
Custom Objects 02	Name, Quick Search 1, Quick Search 2
Custom Objects 03	Name, Quick Search 1, Quick Search 2
Events	Name, Location
Leads	Last Name, First Name
Opportunities	Opportunity Name
Products	Product Name, Product Category, Status
Service Requests	SR Number, Subject
Solutions	Solution ID, Title
Tasks	Subject
Users	Last Name, First Name, Email
Specific to Oracle CRM On Demand High Tech Edition and Oracle CRM On Demand Partner Relationship Management Edition	
Funds	Fund Name, Status
Fund Requests	Fund Request Name, Status
Specific to Oracle CRM On Demand Partner Relationship Management Edition	
Partners	Partner Name, Location

For this record type	The following fields are searched
Specific to Oracle CRM On Demand Automotive Edition	
Dealer	Name, Site
Vehicles	VIN
Specific to Oracle CRM On Demand Life Sciences Edition	
Events	Name, Location
Specific to Oracle CRM On Demand Financial Services Edition	
Households	Household Name
Portfolios	Account Number

Searching for Records in the Action Bar

You can use the Search section of the Action bar to search for records. Before creating a new account, contact, and so on, it is a good idea to determine if the record already exists. In the first field in the Search section in the Action bar, you can select the record type that you want to search. You can select All to search all record types, or you can select an individual record type. You can set the default record type for the Search section. For more information, see Setting Your Default Search Record Type (on page 846).

NOTE: Your user role and the type of search that your company uses determine which record types you can search in the Search section of the Action bar.

About the Different Types of Search

If you search a single record type, the search results are displayed in a List page, and you can then work with the list of records. You can further refine the list using the list management features of Oracle CRM On Demand, and you can save search results as a new list. For more information about managing lists of records, see Working with Lists (on page 112). If you search all record types, a Search Results page is displayed with different sections for each type of record found in the search. When you search using text-based search fields, the searches are case insensitive unless the text *case-sensitive* appears greyed out in the input field. The greyed-out text disappears when you click the field.

You can also go to the Advanced Search page, which allows you to search several record types at once and to search using date fields. Advanced search also provides better filtering capabilities. For more information, see Using Advanced Search (on page 82).

Oracle CRM On Demand supports two types of search: targeted search and keyword search. Your company administrator determines which type of search is used by default for your company, by selecting the search type on the company profile page. In general, targeted search provides better query performance. For more information about targeted search and keyword search, see About Targeted Search (on page 68) and About Keyword Search (on page 78).

NOTE: For targeted search only, a Book selector might be displayed in the Search section in the Action bar. You can use the Book selector to narrow the search so that only the records belonging to a particular user

book (typically referred to as a user) or custom book (typically referred to as a book) are searched. For more information, see Using the Book Selector (on page 93).

What Happens If a Search Returns Only One Record

You can specify how a record is displayed if it is the only record returned by a search. The record can be opened directly in a record Detail page, or it can be shown in a list page. The option that controls this behaviour is the Navigate Directly to Detail Page If Only One Record Is Returned check box, in the Quick Search Options section of the Action bar layout page in your personal setup. For information about setting up your Action bar layout, see Changing Your Action Bar Layout (on page 865).

The following procedure describes how to search for a record in the Action bar.

To search for a record in the Action bar

1 If the Action bar is hidden, show it.

   For information about showing and hiding the Action bar, see About Showing or Hiding the Action Bar (on page 40).

2 In the Action bar, in the first field in the Search section, select a record type, or select All to search all of the record types that are available for searching.

   NOTE: When you select the option to search all record types, Custom Object 01, 02, and 03 record types are included in the search, but Custom Object 04 and higher record types are not included. A search of all of the record types that are available in the search is slower than searching a single record type.

3 Depending on your set-up, enter the value that you want to search for in either a single text field or in several text fields.

4 Click Go.

   TIP: If a message appears indicating that your search request has timed out, you can use Advanced Search to refine your criteria further. For more information, see Using Advanced Search (on page 82). You can also find more information about optimising searches and lists on the Training and Support Web site. To access the Training and Support Web site, click the Training and Support global link at the top of each page in Oracle CRM On Demand.

5 Click the link in the record that you want.

   The Detail page for the record opens.

Using Advanced Search

You can use advanced search to:

■ Search one or more record types at once

■ Search for records using date search fields

■ Search using filter criteria for each field

The sections available in the Advanced Search page change according to whether you select a single record type or multiple record types for your search.

About Advanced Searches of Single Record Types

An advanced search of a single record type is similar to a targeted search in the Search section of the Action bar. You can search using multiple fields on the record type. However, an advanced search also allows you to do the following:

■ Select any of the fields that are visible to your user role as search fields

■ Enter the conditions, filter values, and operators (AND, OR) that define the filter

■ Specify which fields to display in the search result

NOTE: In an advanced search of a single record type, you do not use the equal sign (=) to search for an exact match. Instead, you use the Equal to condition or the Equals any condition to search for exact matches.

When you use advanced search to search a single record type, your user role determines which record types you can search and which fields on each record type you can search, as follows:

■ If your company administrator does not make any search fields available in the search layout that is assigned to your user role for a record type, then you cannot specify any search criteria for an advanced search of that record type. Running an advanced search without any search criteria returns all of the records of that record type that your user role and access settings allow you to see.

■ If the All Fields in Search and Lists privilege is enabled on your user role, then you can search all of the fields that your company administrator makes available in the search layout that is assigned to your user role for the record type.

   NOTE: It is recommended that company administrators do not enable the All Fields in Search and Lists privilege for most user roles. When the privilege is not enabled, fields that your company does not use are not visible in search and list pages. This reduces clutter and makes it easier for users to see the fields that they are most interested in.

■ If the All Fields in Search and Lists privilege is not enabled on your user role, then you can search a field only if it meets both of the following criteria:

   ■ The field is available in the search layout that is assigned to your user role for the record type.

   ■ The field is displayed on the Detail page layout that is assigned to your user role for that record type. If dynamic page layouts are defined for your role, then the field must be displayed on at least one of the dynamic page layouts.

   NOTE: *Dynamic layouts* are page layouts that show different sets of fields for different records of the same record type, depending on the picklist value that you select in a certain field on the record.

When you use advanced search to search a single record type, the search results are displayed in a List page, and you can then work with the list of records. The search layout that is assigned to your user role determines which fields are displayed in the list of records returned by the search. For more information about managing lists of records, see Working with Lists (on page 112).

About Advanced Searches of Multiple Record Types

An advanced search of multiple record types is a keyword search. You can search some or all of the record types that support keyword search. When you use advanced search to search multiple record types, a Search Results page is displayed with different sections for each type of record found in the search.

NOTE: When you select the All Record Types option in the list of record types to search, only the record types that support keyword search are included in the search. To search record types that do not support keyword search, you must search one record type at a time.

For more information about how a keyword search works, see About Keyword Search (on page 78).

What Happens If a Search Returns Only One Record

You can specify how a record is displayed if it is the only record returned by a search. The record can be opened directly in a record Detail page, or it can be shown in a list page. The option that controls this behaviour is the Navigate Directly to Detail Page If Only One Record Is Returned check box, in the Quick Search Options section of the Action bar layout page in your personal setup. For information about setting up your Action bar layout, see Changing Your Action Bar Layout (on page 865).

To perform an advanced search of a single record type

1   If the Action bar is hidden, show it. For information about showing and hiding the Action bar, see About Showing or Hiding the Action Bar (on page 40).

2   In the Action bar, in the Search section, click Advanced.

3   In the Advanced Search page, do the following:

   a   Select the Following Record Types radio button.

   b   Select the check box for the record type that you want to search.

   c   Make sure that the check boxes for all other record types are not selected.

4   In the Search In section, select one of the following options:

   ■   Record Set

   ■   Book

   NOTE: The Search In section is not displayed for record types that do not have owners, for example, the Product record type and the User record type. The Book option in the Search In section is available only if the Book feature is enabled for your company.

5   In the Search In section, if you select the Record Set option, then select one of the following to specify the set of records you want to search:

   ■   **All records I can see.** Includes records that you have at least View access to, as defined by your reporting hierarchy, the access level for your role and the access level for shared records.

       NOTE: The Manager Visibility Enabled option on the company profile and the Can Read All Records setting on your user role are considered when you select this option. If the Manager

Visibility Enabled option on the company profile is not selected, then the set of records that is searched when you choose the All Records I Can See option is the same set of records that is searched when you select the All Records Where I Am on the Team option, unless the Can Read All Records setting on your user role is selected for the relevant record type.

■ **All records I own.**

■ **All records where I am on the team.** Includes only records in the filtered list where one of the following applies:

   ■ You own the records.

   ■ The records are shared with you by the owner through the Team feature.

   ■ The records are shared with you through the group assignment feature for accounts, activities, contacts, households, opportunities, and portfolios.

■ **All records I or my subordinates own.** Includes records that you or any of your subordinates own. The Manager Visibility Enabled option on the company profile is not considered when you select this option.

■ **All records where I or my subordinates are on the team.** Includes records where you or any of your subordinates are on the team, if Manager Visibility is enabled on the company profile. The Manager Visibility Enabled option on the company profile is not considered when you select this option.

■ **My Default Book**. Your default setting for the Book selector, as defined by your company administrator.

6 In the Search In section, if you select the Book option, then select a book, user, or delegate in the Book selector.

For more information, see Using the Book Selector (on page 93).

7 In the Choose Case Sensitivity section, select the Case Insensitive check box if required.

If this check box is selected, then certain fields become case-insensitive for the search. These fields are shown in blue text in the Enter Search Criteria section.

8 In the Enter Search Criteria section, perform the following:

a Select a field from the Field list.

The fields are prepopulated with the targeted search fields for the record type.

Certain fields are optimised to improve performance during searches and when sorting lists. These optimised fields are shown in green text in the list of search fields. If your search criteria include a field that is not optimised for searching, your search might be slower. You can filter against a maximum of 10 fields.

NOTE: The fields that are shown in purple text in the Enter Search Criteria section are always case-insensitive, regardless of the setting of the Case Insensitive check box. These fields are not optimised for fast searches.

b Enter the conditions, filter values and operators (AND, OR) that define the filter.

For information about using filter conditions, see About Filter Conditions (on page 71).

CAUTION: When entering Filter Values, check to make sure you follow the rules described in About Filter Values (on page 77). Otherwise, you might not find the correct records.

Examples

Accounts: If you want to create a filtered list of accounts in the UK with annual revenue over $100,000,000.00, complete the form as follows:

Field	Condition	Value(s)	
Annual Revenue	Greater than	100000000	AND
Country	Equal to	Canada	

Leads: If you want to create a filtered list of leads with potential revenue over $100,000.00 and ratings of A or B, complete the form as follows:

Field	Condition	Value(s)	
Potential Revenue	Greater than	100000	AND
Rating	Less than	C	

9 In the Display Columns section, choose the fields to display as columns in the search results by moving fields from the Available Fields list to the Selected Fields list. Use the up and down arrows to change the order of the selected fields.

TIP: After the list of records is returned, you can quickly change the order of the columns in the list by dragging the column headings to a new location and dropping them. You can optionally save the list after you change the order of the columns.

10 In the Sort Order section, in the Sort by drop-down list, select a default sort field, and click Ascending or Descending to select a sort order.

Certain fields are optimised to improve performance during searches and when sorting lists. These optimised fields are shown in green text in the list of sort fields. If you select a field that is not optimised as the default sort field, your search could be slower.

NOTE: You cannot select a field of type check box as the sort field in this step. However, after the list is created, you can click the column header to sort the fields based on the values in the check box.

11 Click Go.

The records that are returned by the advanced search of a single record type are displayed in a List page. If there are too many records in the list, then you can filter or refine the list in the List page. For information about filtering and refining lists in List pages, see the following topics:

■ Filtering Lists (on page 123)

■ Refining Lists Within List Pages (on page 125)

To perform an advanced search of multiple record types

1 If the Action bar is hidden, show it. For information about showing and hiding the Action bar, see About Showing or Hiding the Action Bar (on page 40).

2 In the Action bar, in the Search section, click Advanced.

3 In the Advanced Search page, select the option you want, as follows:

■ Select the All Record Types option to search all of the record types that support keyword search. This query is slower.

■ Select the Following Record Types option, and then select the check box for each of the record types that you want to search.

4 In the Keywords field, enter the value that you want to search for or leave the Keywords field blank to search only on the basis of the dates that you provide.

NOTE: In the Keywords field, it is not necessary to use a wildcard (*) for a partial word because a wildcard is automatically added to the beginning and end of the user input. The use of the equal sign (=) to search for an exact match is not supported.

5 If required, enter the date range (use four digits for the year, such as 2010):

■ For Appointments, the date applies to Start Time (Date).

■ For Tasks, the date applies to Due Date.

■ For Opportunities, the date applies to Close Date.

■ For all other record types, the date applies to the Created date.

6 Click Go.

The results appear for each record type.

TIP: If a message indicates that your search request has timed out, then refine your search criteria further, and try again. You can also find more information about optimising searches and lists on the Training and Support Web site. To access the Training and Support Web site, click the Training and Support global link at the top of each page in Oracle CRM On Demand.

Finding Records in List Pages

Use the following procedure to find records in a list page.

To find a record in a list page

1 Click the tab for the type of record that you want to find.

2 On the record Homepage, select the filtered list that would include the record that you are trying to find.

You can also go to the required list from the Favourite Lists section in the Action bar if the list is available there.

3 On the List page, you can do the following:

■ Use an Alpha Search to find the record.

NOTE: If your user language is Korean, Japanese, Simplified Chinese, or Traditional Chinese, then the Alpha Search controls are not available.

■ Use the Quick Filter fields to find the record.

■ Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.

For more information about using Alpha Search and the Quick Filter fields, see Filtering Lists (on page 123).

4 Click the link in the record that you want to work on.

The Detail page for that record opens.

Searching for Records in Lookup Windows

You use Lookup windows to search for and select records that you want to associate with the record you are working with. You usually open a Lookup window by clicking the Lookup icon next to a field. Depending on the record types that you are working with, you can also open Lookup windows by clicking Add in certain related information sections of Record Detail pages. Also, if smart associations are enabled, then Lookup windows open automatically in certain cases. For more information about smart associations, see About Smart Associations and the Auto-Resolve Functionality (on page 92).

The appearance and behaviour of Lookup windows depend on the following:

■ **The type of search that is enabled for your company.** Depending on the type of search your company administrator selects for your company, either keyword search or targeted search, Lookup windows are affected as follows:

■ **If keyword search is enabled.** A single text field is displayed in the Lookup window. You can enter search criteria and press Enter, or click Go to refine the list of records.

NOTE: Some record types do not support keyword search. For such record types, if keyword search is the default search type for the company, then you can perform a targeted search in the Lookup window.

■ **If targeted search is enabled.** Quick Filter search fields are displayed in the Lookup window. You can enter search criteria, and press Enter, or click Go to refine the list of records. An Advanced link is also displayed. This link is similar to Using Advanced Search (on page 82). If your company uses books, then a Book selector is also displayed. The Book selector enables you to narrow the search to the records belonging to a particular user or book. For more information, see Using the Book Selector (on page 93).

Targeted search is the recommended search type. For more information about targeted search and keyword search, see About Targeted Search (on page 68) and About Keyword Search (on page 78).

■ **The type of association in the Lookup window.** Lookup windows are either single-association windows, where you can select one record to link to the record that you are working with, or multi-association Lookup windows, where you can select multiple records to link to the record that you are working with. For example, you can link contacts to a task in the following ways:

■ In the Task Detail page, if you want to add a primary contact for the task, then you click the lookup icon in the Primary Contact field. In this case, a single-association Lookup window opens, and you can select a single contact as the primary contact for the task.

■ You can link multiple contacts to a task in the Contacts related information section of the Task Detail page. In this case, you click Add in the Contacts related information section. A multi-association Lookup window opens, and you can select one or more contacts to link to the task.

■ If your company administrator adds the Contacts field to the Task Detail page, then you can link multiple contacts to the task by clicking the lookup icon in that field. A multi-association Lookup window opens, and you can select multiple contacts. The contacts that you select are listed in the Contacts field and are also listed in the Contacts related information section on the Task Detail page.

■ **The search layouts that your company administrator sets up for the record types.** For example, when you use a Lookup window to find an account record that you want to link to a contact record, the appearance of the Lookup window depends on the search layout for the Account record type for your user role.

■ **The Record-Type Lists in Lookup Windows setting on the company profile.** This setting determines whether you can restrict a search in a Lookup window to a predefined list of records. The setting has the value Enabled by default, allowing you to restrict searches in Lookup windows. For more information, see the Lists for Restricting Searches section of this topic.

Lookup Window Features Controlled by Search Layouts

The search layouts that your company administrator sets up and assigns to user roles determine the behaviour of Lookup windows, as follows:

■ **Quick Filter fields.** If targeted search is enabled for your company, then the search layout for the record type for your user role determines how you can use the Quick Filter fields in the Lookup window, as follows:

■ If your company administrator does not make any search fields available in the search layout, then you cannot use the Quick Filter.

■ Generally, you can filter the list of records shown in the Lookup window on any of the fields that your company administrator makes available as search fields in the search layout.

However, if the search criteria for the list of records shown in the Lookup window include a field that is not one of the search fields defined in the search layout, then you cannot use the Quick Filter. For example, if you are searching for an account record, and your company set-up allows you to restrict your search to a predefined list of records, then you might decide to search the All Customer Accounts list in the Lookup window. However, the search field for the All Customer Accounts list is the Account Type field. If the Account Type field is not available as a search field for your role, then you cannot filter the list of records in the Lookup window. For more information about selecting predefined lists of records in Lookup windows, see the Lists for Restricting Searches section of this topic.

■ If the Configure Lookup Window with Division as the Default Search Field setting is selected in Step 2 of the Product Search Layout Wizard, then in the Product Lookup window, the Division field becomes the default search field, and if the user has a primary division, this field is populated with the user's primary division.   If the user has no primary division, then it is preferable for the user to select a division from the Product Lookup window to search for products within a specific division. If the user does not select a division and clicks Go to complete the search, then Oracle CRM On Demand displays all products in the search results.

If the Configure Lookup Window with Division as the Default Search Field setting is not selected in Step 2 of the Product Search Layout Wizard, then the product name remains the default search field for the Product Lookup window, however, the products that Oracle CRM On

Demand displays depend on the options selected by your administrator in Step 3 of the Product Search Layout Wizard. The division is not displayed in the search list unless your administrator chooses it as a search field in the product search layout.

The Configure Lookup Window with Division as the Default Search Field setting is not selected by default. For more information on this setting, see Managing Search Layouts.

■ **Prepopulated lists of records.** If your company administrator selects the Show Search Results When Lookup Window Opens option on the search layout for a record type, then the Lookup window is populated with a list of records when the window opens. If this option is not enabled, then no records are displayed when the Lookup window opens, and you must specify the search criteria to find the record you want.

■ **Context-sensitive lists.** If the Record-Type Lists in Lookup Windows setting on the company profile has the value Enabled, then your company administrator can configure the search layout for a record type to specify whether any available context-sensitive lists appear before the system lists and custom lists in the *record type* List field in the upper-left corner of Lookup windows for the record type. *Context-sensitive lists* are predefined sets of records that are most likely to include the record that you want. For more information about the *record type* List field in Lookup windows, see the Lists for Restricting Searches section of this topic.

■ **Displayed columns.** In most cases, the search layout determines which fields display as columns in the list of records in the Lookup window. However, there are some preconfigured Lookup windows that are not affected by the search layout.

Lists for Restricting Searches

Depending on your company set-up, you might be able to restrict a search in a Lookup window to a predefined list of records. Also, depending on the context in which you are searching for a record, you might be able to restrict your search to a context-sensitive list. The ability to restrict a search to a list of records is determined by the Record-Type Lists in Lookup Windows setting on the company profile. If the Record-Type Lists in Lookup Windows setting is Enabled on the company profile, then a set of predefined lists that you can use to restrict your search is available in the *record type* List field in all Lookup windows for top-level record types, where *record type* is the name of the type of record that you are searching for. The set of predefined lists that is available to you in the *record type* List field can include standard lists and custom lists, and it also includes any available context-sensitive lists.

By default, all of the standard lists and custom lists that are available in the List pages and in the Homepage for a top-level record type are also available in the Lookup windows for that record type. However, your company administrator can determine which lists are available for your user role, and you can choose which of the available lists appear in your set of lists. For more information, see Changing Sets of Lists for Record Types (on page 129).

NOTE: If the *record type* List field is available in Lookup windows, then the first list in the set of lists in the *record type* List field is active by default when a Lookup window opens. If some context-sensitive lists are available in the Lookup window, and the search layout for your user role specifies that the context-sensitive lists appear at the top of the set of lists in the *record type* List field in the Lookup window, then the first available context-sensitive list is active by default when the Lookup window opens. If the *record type* List field is not available in Lookup windows, then the initial search for a record of a given record type in a Lookup window is performed on all records of that record type that you can access.

The list that is active in the Lookup window determines the filter for the set of records that is searched in the Lookup window, even if the records are not displayed in the Lookup window. Any additional filters that you apply in the Lookup window are applied to the set of records in the selected list. For example, assume that you have the following set-up:

- The Record-Type Lists in Lookup Windows setting on the company profile has the value Enabled so that the set of predefined lists is available in the Lookup windows.

- You have a custom list called *All My Contacts in California* that shows all contacts where the value in the State field is *California*.

- The *All My Contacts in California* list is the first list in your set of lists for the record type.

- In the search layout for the Contact record type for your role, your company administrator specified that the Lookup window is not populated when it opens, and that context-sensitive lists are not shown at the top of the set of lists.

In this case, when you open a Lookup window for the Contact record type, the *All My Contacts in California* list is active, even though the records are not displayed in the Lookup window. If you enter *Jane* in the First Name filter field and click Go, then all contacts where the value in the State field is *California* and the value in the First Name field is *Jane* are returned in the Lookup window. If you decide to search a different list of records for contacts whose first name is Jane, then you can select that list in the record type List field, and click Go.

NOTE: When you open a Lookup window to search for a contact to link to a record of another record type, the Favourite Contacts list is available in the *record type* List field. You can select a favourite contact to link that contact to the parent record.

About Context-Sensitive Lists

The following are some of the context-sensitive lists that might be available to you in the Lookup window:

- In the Task Edit page, if you select a valid value in the Account field and you open the Lookup window for the Primary Contact field, then the following lists might be available as context-sensitive lists:

  - The Contacts with Related Account as Primary list. This list includes all of the contacts for which the selected account is the primary account.

    NOTE: In releases earlier than Release 25, the *Contacts with Related Account as Primary* list was named *Contacts for Related Account*.

  - The All Contacts for Related Account list. This list includes all of the contacts that are linked to the selected account, irrespective of whether the selected account is the primary account for the contact.

    NOTE: The All Contacts for Related Account list is available in all Lookup windows where the Contacts with Related Account as Primary list is available, except in the case of multi-association Lookup windows. If the Lookup window is a multi-association window, then the Contacts with Related Account as Primary list is available, but the All Contacts for Related Account list is not available.

- In the Task Edit page, if you select a valid value in the Contact field and you open the Lookup window for the Service Request field, then the Service Requests for Related Contact list might be available as a context-sensitive list.

- In the Service Request Edit page, if you select a valid value in the Contact field and you open the Lookup window for the Financial Account field, then the Financial Accounts for Related Contact list might be available as a context-sensitive list.

- In the Lead Edit page, if you select a valid value in the Account field and you open the Lookup window for the Financial Account field, then the Financial Accounts for Related Account list might be available as a context-sensitive list.

Searching for and Selecting a Record in a Lookup Window

This procedure describes how to search for and select a record.

To search for and select a record in a Lookup window

1 In the Lookup window, search for the record or records that you want in some or all of the following ways, depending on the record type and on how your company administrator sets up the search features:

■ In the Lookup window, in the *record type* List field, select a predefined list to restrict your search to the records in that list, and then click Go.

■ Use the Quick Filter fields to filter the list.

NOTE: Each time that you apply a filter to a list of records in the Lookup window, only the records that are currently in the list are searched. So, if you apply a second filter to a list that you already filtered, then only the records that were returned by the first filter are searched when you apply the second filter. If you want to clear all of the filters, then click the Clear button. When you click Clear, all of the filters you applied to the list that you originally selected are removed from the list, and the Quick Filter fields are reset to blank. You can then apply new filters to the list, as necessary.

■ If targeted search is enabled, click the Advanced link to filter the list, which is similar to Using Advanced Search (on page 82).

■ Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.

NOTE: For some record types, you can also click New to create a new record. The new record will be added to the list.

2 Select the records that you want, as follows:

■ If the Lookup window is a single-association window, click Select for the record that you require.

■ If the Lookup window is a multi-association window, click Select for each of the records that you require. The records are moved from the Available Records list to the Selected Records list. When you have selected all of the records that you want, click OK.

NOTE: In the Lookup window, you can click Clear Current Value to remove already-selected information and leave the field blank. However, the Clear Current Value button is not available if smart associations are turned on. For more information about smart associations, see About Smart Associations and the Auto-Resolve Functionality (on page 92).

About Smart Associations and the Auto-Resolve Functionality

Smart associations in Oracle CRM On Demand are automatic searches that make it easier for you to associate records of different record types, such as account, contact, opportunity, activity, and so on with each other. The smart associations functionality is controlled by the Auto-Resolve Enabled check box on search layouts, for more information, see Managing Search Layouts.

When smart associations are enabled, you can type part or all of the name of the record that you want to associate with the main record in the appropriate field, and then allow Oracle CRM On Demand to automatically resolve the association. When you try to save your changes, Oracle CRM On Demand searches

for a match for the name you entered. If Oracle CRM On Demand finds a unique match, then the matching record is used, and your changes are saved. If Oracle CRM On Demand finds no match or finds multiple potential matches, then you are presented with a Lookup window where you can perform additional searches, and then select the appropriate record.

For example, when you want to associate an account with a task, you can type the name of an account in the Account name field on the Task Detail page. When you try to save your changes, Oracle CRM On Demand searches for matching accounts. If Oracle CRM On Demand finds a unique matching account, then that account is used. If Oracle CRM On Demand finds no matching account or finds multiple potentially matching accounts, then a Lookup window opens. In the Lookup window, you can perform additional searches, and select the appropriate account. For more information about using Lookup windows, see Searching for Records in Lookup Windows (on page 88).

If smart associations are not enabled, or you do not know the name of the record that you want to associate with the record you are working with, then you must click the Lookup icon next to a field to open the Lookup window. In the Lookup window, you can search for the record that you want to associate with the record that you are working with.

NOTE: Smart associations are applicable where single-association Lookup windows are available. Where multiassociation Lookup windows are available, smart associations are not applicable. Smart associations are not supported in fields within concatenated fields.

Using the Book Selector

The Book selector allows you to narrow your searches to a particular user book or custom book. In the context of the Book selector, custom books are referred to as books.

Where Is the Book Selector Displayed?

The Book selector is displayed in:

- The Search section in the Action bar

- The Lookup window

- The Search In section in advanced searches

- List pages

- The Reports tab and the Dashboard tab

The Book selector is displayed only if both of the following conditions apply:

- The Display Book Selector option is enabled in your company profile.

- The record type is supported for books.

  For information about which record types are supported for books, see Book Management.

With the Book Selector You Can Restrict Your Search

The Book selector allows you to restrict your search to a specific user or book. The Book selector therefore displays a hierarchy of users and a hierarchy of books, with All at the top of the hierarchy. You can expand or

collapse each level in the hierarchy. Most employees see only a hierarchy of users, because the custom book feature is not enabled by default.

For reports and dashboards, the book hierarchy is displayed only if Full Visibility is selected in the Historical Subject Areas setting in the company profile.

Levels in a Book Hierarchy

When you expand a level in the book hierarchy, and if there are more than 500 books at that level of the hierarchy, then the books are grouped in sets of 500. The label for a set of books shows the name of the first book and the name of the last book in the set. You can expand the appropriate set of books to find the book that you want. The final set of books can contain fewer than 500 books.

Default Book in the Book Selector

The settings on your user record determine which book you see by default in the Book selector. For information about the default books in the Book selector, see the descriptions of the following fields in Updating Your Personal Details (on page 836):

- Default Book

- Default Book for Analytics

- Preserve Default Book

Considerations That Apply When You Select a Book in the Book Selector

When selecting a book in the Book selector, the following considerations apply:

- When you select a book that has subbooks, the parent book and all of its subbooks are selected.

  CAUTION: For optimal performance, include subbooks only when absolutely necessary.

- Each user has a set of default books. If you select All, all of the books applicable to you and your subordinates (if any) are selected.

- Within the User hierarchy you can choose users that have delegated their access to you or users in your organisation.

- After you select a book or user, and click OK, the name of the book or user is displayed in the Book selector. The plus sign (+) indicates that children in the hierarchy are also selected.

- You can use the Include Sub-Items check box to control whether subbooks or subordinates are included in the respective hierarchy.

NOTE: The books that are automatically created when active partner records are created appear in the Book selector for the Partner record type only.

Finding Records Using Enhanced Keyword Search

In addition to searching for records in the Search section of the action bar, you can also use the enhanced keyword search to locate records, if your company administrator has set up the Enhanced Keyword Search

section in the Action bar or in the global header. You can use the enhanced keyword search for the following record types:

◼ Accounts

◼ Appointments

◼ Contacts

◼ Opportunities

◼ Tasks

When you enter a search string, the enhanced keyword search feature tries to find that string in several key fields for all records to which you have visibility, for the record type that you are searching. For example, if you are searching accounts, then the enhanced keyword search searches the Account Name, Location and Billing City fields to locate the required accounts. For example, consider that you have three account records, the first with the Location field set to San Francisco, and the second and third with the Location field set to San Mateo. If you enter San as the search string, then the enhanced keyword search returns all three account records. However, if you search for San Mateo, then the search returns only the second and third account records. For more information on enhanced keyword search, see About Enhanced Keyword Search.

If your company administrator selects the Configure Enhanced Keyword Search with Selected Search Results Fields option for the search layout that is assigned to your role for a record type, then an enhanced search for records of that type displays the set of results fields defined in the search layout. Otherwise, the key fields for the record type are displayed during an enhanced search. For example, if the administrator configures only the First Name, Last Name, and Account fields in the Search Layout Wizard for a contact, then the search only lists these fields in the search result page when you search for contacts.

Before you begin. To complete the following procedure, your company administrator must do one of the following:

◼ Set up the Enhanced Keyword Search section of the Action bar.

◼ Set up the Enhanced Keyword Search section in a search icon in the global header if you are using the modern style interface.

To use enhanced keyword search to find records

1 Navigate to the Enhanced Keyword Search section in the Action bar or the global header as follows:

◼ If your administrator has set up the Enhanced Keyword Search section in the Action bar, then navigate to that section in the Action bar. For information about showing and hiding the Action bar, see About Showing or Hiding the Action Bar (on page 40).

◼ If you are using the modern style user interface and your administrator has set up the Enhanced Keyword Search in a search icon in the global header, then click the search icon and navigate to the Enhanced Keyword Search section.

2 In the Enhanced Keyword Search section, select a record type.

NOTE: Only the Account, Appointment, Contact, Opportunity, and Task record types are supported for enhanced keyword search. The record type displayed by default in the Enhanced Keyword Search section is set by the Default Search Record Type field in a user's Personal Detail page.

TIP: To see the fields that the enhanced keyword search feature searches for by record type, select a record type, then hover your mouse over the tooltip icon beside the search field.

3 Enter the string that you want to search for in the search field.

4 Click Go or Advanced Search.

TIP: If a message appears indicating that your search request has timed out, you can use Advanced Search to refine your criteria further. For more information, see Using Advanced Search (on page 82). You can also find more information about optimising searches and lists on the Training and Support Web site. To access the Training and Support Web site, click the Training and Support global link at the top of each page in Oracle CRM On Demand, and then click the link in the record that you want.

■ If you clicked Go, then you can click the link for the record that you want to open the Detail page for.

■ If you clicked Advanced Search, then the Advanced Search page opens with the record type that you selected in step 2. The record type is preselected on the Advanced Search Page.

You can then complete the search parameters and criteria in the Advanced Search page. For more information on using advanced search, see Using Advanced Search (on page 82).

Related Topics

See the following topics for related information:

■ About Enhanced Keyword Search (on page 96)

■ Finding Records (on page 68)

■ About Targeted Search (on page 68)

■ About Keyword Search (on page 78)

■ Searching for Records in the Action Bar (on page 81)

■ Using Advanced Search (on page 82)

About Enhanced Keyword Search

In addition to targeted search and keyword search, Oracle CRM On Demand supports enhanced keyword search. Enhanced keyword search can find records containing strings that are similar to the search string entered, in addition to finding records with an exact match. This search can match records with the exact search string that you enter regardless of the string's sequence or how the string is divided using spaces or punctuation. It can match records that are based on the linguistic root of words, and it can also match words that are spelled similarly.

Generally, targeted search provides better performance than enhanced keyword search. If you know the exact string for that you want to search for, then use the targeted search that is available in the Search or Advanced Search sections in the UI, rather than the Enhanced Keyword Search section. If you are not sure of the exact string, and if you want to find records that are similar, then use enhanced keyword search.

Enhanced keyword search contains one search field that is used to search for a selected record type containing the supported fields, as shown in the following table.

Record Type	Fields Included in Enhanced Keyword Search
Account	■ Account Name ■ Location ■ Billing City
Appointment	■ Subject
Contact	■ Contact First Name ■ Contact Last Name ■ Email ■ Contact City
Opportunity	■ Opportunity Name
Task	■ Subject

The tooltip in the Enhanced Keyword Search section for each record type shows the fields supported for that record type. For example, if you enter *Sunnyvale* when searching Accounts, then enhanced keyword search looks for Sunnyvale in the Account Name, Location, and Billing City fields for all accounts that you can access. The search displays all records that have the search string that you entered in the supported search fields.

Characteristics of Enhanced Keyword Search

This topic describes the characteristics of enhanced keyword search.

■ The search performs the following word matching:

  ■ Exact word matches

    Searches for records that contain the exact search string, that is, the same spelling as the string entered in the search.

  ■ Accumulation matches

    Searches for records that contain at least one occurrence of the search string, with the returned records ranked by a cumulative score that is determined by how many search string matches are found and how frequently they occur. For example, a search for *First National Bank of Arizona* returns the Arizona First National Bank record, with four matching string values, prior to the First National Bank record, with only three matching string values.

  ■ Stemming matches

    Searches for records that contain values that have the same linguistic root as the query string. For example, a search for Manufacturer returns records containing Manufacturing or Manufactured, in addition to Manufacturer. (Stemming matches are supported in English only.)

  ■ Fuzzy matches

    Searches for records that contain words that are spelled similarly to words in the specified search string. For example, searching for *Oracle* misspelled as *Orcale* results in finding the records that contain *Oracle.* (Fuzzy matches are supported in English only.)

- The search is case insensitive (for example, a search for *Bella* returns *Bella* or *bella)*

- The search ignores the following items:

  - Diacritical marks, for example, a search for *Velka* returns *Veľká*

  - Punctuation, including the following:

    - Apostrophe (')

    - Brackets ([ ])

    - Angle brackets (< >)

    - Braces ({ })

    - Parentheses [( )]

    - Colon (:)

    - Comma (, ˛)

    - Dashes (–   —   ─)

    - Ellipsis points (…   …   . . .)

    - Exclamation mark (!)

    - Period (.)

    - Hyphen (-)

    - Question mark (?)

    - Quotation marks   (' '   " "   '   " ")

    - Semicolon (;)

    - Slash (/   /)

  - Noise words

    In a search query, enhanced keyword search ignores noise words in English, Danish, Dutch, Finnish, French, German, Italian, Portuguese, Spanish, and Swedish. A noise word is a word that is so common that it is not useful and is ignored to save time doing searches. In English, examples of noise words include words, such as *or*, *and*, or *the*.

- Enhanced keyword search requires specialised search indexes. Data from Oracle CRM On Demand is synchronized to the search indexes over time intervals, therefore, you might find that a record that was recently added or modified is not found until a later time.

- Because enhanced keyword search is a complex search, the search performance might vary depending on the search criteria and the data quality. It is recommended that you search with a more refined search criterion, or that you use the Advanced Search in cases where you know the exact string or field for which to search.

Type-Ahead Support

Enhanced keyword search supports type-ahead search. The type-ahead search searches for records in the Recent Items lists that contain the search string in the supported fields for the specific record type that you

are searching. The type-ahead search is case insensitive and ignores diacritical marks, and the match can be at the beginning of the field value, or a substring of the field value, or at the end of the field value.

Recent Items lists that are supported include the following lists:

◼ My Recently Viewed *record type*

◼ My Recently Created *record type*

◼ My Recently Modified *record type*

When you enter the search string, the type-ahead search opens a small Recent Items window near the Enhanced Keyword Search section. This window lists all records containing strings that match the search string characters entered, up to a maximum of 10 records. The type-ahead search matches one character at a time in bold font, as you enter the search string. The items listed in the window display the name of the record and the supported field names in parentheses [( )] after the record name. The name of the record is derived from the fields as shown in the following table.

Record Type	Fields Displayed to Derive the Record Name
Account	Account Name
Appointment	Subject
Contact	First Name Last Name
Opportunity	Opportunity Name
Task	Subject

If the search string matches a value in a supported field, then the values that match are in bold. For example, if the value is contained in the Location field for an Account record, then the window displays Account Name (**Location**, Billing City). For example, you might create three accounts with the settings shown in the following table.

Account Name	Location	Billing City
Account1	California	Sunnyvale
Account2	California	Sunnyvale
Account3	Sunnyside	Sunnyside

If you search for *Sunnyvale* for Accounts, the Recent Items window shows the following when you enter *S*:

Account3 (**S**unnyside, **S**unnyside)
Account2 (California, **S**unnyvale)
Account1 (California, **S**unnyvale)

When you enter *Sunnyv*, the Recent Items window shows the following:

Account2 (California, **Sunnyv**ale)
Account1 (California, **Sunnyv**ale)

The search returns the Account records in the Recently Viewed Accounts, Recently Created Accounts, and the Recently Modified Accounts lists that contain Sunnyvale in the Account Name, Location, or Billing City fields. Clicking any record that is returned in the Recent Items window opens the Detail page for that record.

Related Topics

See the following topics for related information:

- Finding Records Using Enhanced Keyword Search (on page 94)
- Finding Records (on page 68)
- About Targeted Search (on page 68)
- About Keyword Search (on page 78)
- Searching for Records in the Action Bar (on page 81)
- Using Advanced Search (on page 82)

Copying Records

For most record types, you can create a new record by copying an existing record. When you copy a record, the values in certain fields in the record are copied to the new record. Your company administrator determines which field values are copied to the new record. However, any links between the record that you copy and any other records are not copied to the new record.

When you copy a record, you can change the values that are copied to the new record and add values in the fields where the values were not copied from the original record.

The following procedure describes how to copy a record.

To copy a record

1   Find the record that you want to copy.

    For information on finding records, see Finding Records (on page 68).

2   In the List page for the record type, click the name link of the record that you want to copy.

    TIP: For many record types, the Copy option is available on the List page. If it is available, select the Copy option on the List page, and then skip to step 4.

3   In the Detail page for the record, click Copy.

4   In the Edit page, enter the details for the new record.

    You can edit the values that were copied from the original record and enter values in the empty fields.

5   Save the new record.

Previewing Records

If the record preview functionality is enabled, you can preview records from record links in many places in Oracle CRM On Demand, including the following:

■ My Homepage

■ Record Homepages

■ Record List pages

■ Record Detail pages (including lists of related records)

■ Action bar

Depending on your record preview settings, the preview window opens when you rest your pointer on a link to a record, or when you click a preview icon, which appears when you rest your pointer on a link to a record. The preview window shows the first section of the Detail page of the record.

The record preview settings can be specified at company level, and by each individual user. Your personal settings override the company setting.

For information about setting your record preview mode, see Setting Your Record Preview Mode (on page 847). For more information about setting the record preview mode at company level, see Setting Up Your Company Profile and Global Defaults.

NOTE: The record preview functionality is not available when you are accessing Oracle CRM On Demand through a device running the iOS operating system.

To preview a record

■ Rest your pointer on the record link.

　　■ If your record preview option is set to Hover on Link, the preview window opens automatically.

　　■ If your record preview option is set to Click on Preview Icon, an icon appears when you rest your pointer on the link. Click the icon to open the preview window.

NOTE: You cannot use the inline edit functionality or the message centre while a preview window is open.

To close the record preview window

■　Click the X icon on the preview window, or click the page behind the preview window.

NOTE: If you move your pointer over any UI element (except the preview window, the record link, or the preview icon), the preview window closes automatically after 2 seconds.

About Record Locking

For certain record types, your company administrator can set up processes to restrict the actions that you can perform on a record while a field on the record has a particular value. Restricting users from performing certain actions in this way is referred to as *locking records*. When a record is locked by a process, Oracle CRM

On Demand does not allow you to perform the actions that are not permitted by the process, and you might also see an error message if you try to perform an action that is not permitted.

Depending on how your company administrator configures the record-locking processes for your company, the processes can restrict user actions as follows:

- **Record-level actions.** Record-locking processes can prevent you from performing the following actions on a locked record:

  - Updating the record.

  - Deleting the record.

  - Removing the record from a relationship with another record, if removing the record from the relationship results in the record being deleted from Oracle CRM On Demand. However, if removing the record from the relationship does not result in the record being deleted from Oracle CRM On Demand, then you can remove the record from the relationship even if you are prevented from deleting the record.

    For example, your company administrator might set up a process for the Solution record type. The process might prevent you from deleting solutions that have the Approved status, or from updating solutions that have the Obsolete status, and so on.

- **Related record-level actions.** Record-locking processes can prevent you from performing the following actions on records of a given related record type while the parent record is locked:

  - Creating a new record of the related record type from the parent record.

  - Updating records of the related record type that are child records of the parent record. In this case, you cannot update the related records from anywhere in Oracle CRM On Demand while the parent record is locked.

  - Adding an existing record of the related record type to the parent record.

  For example, you might be prevented from linking contact records to a task when the status on the task is set to Completed.

- **Field-level actions.** Record-locking processes can prevent you from updating certain fields while a field on the record has a particular value so that the record is partially locked.

  For example, if your company uses shared addresses, then you might be prevented from updating address lines 1, 2, and 3, the State, Zip or Postal Code, and Country fields while the status on the address is set to Validated. However, you can continue to update any custom fields on the address record.

For information about setting up processes to lock records, see Process Administration.

About Overriding Record-Locking Processes

Certain users are given the Override Process Administration privilege so that they can update locked records. If your user role has the Override Process Administration privilege enabled, then the record-locking processes do not prevent you from performing actions on locked records. In addition, you do not see any warning messages or error messages to indicate that a record is locked.

Updating Record Details

Generally, you can update record information if you own the record, you manage the owner of the record or the owner grants you editing access to the record. However, your company administrator can adjust access levels to restrict or expand your access to records.

Also, for solution records, your user role must include the Publish Solutions privilege.

NOTE: Certain system fields are always read only and can be updated only by Oracle CRM On Demand. Some examples of fields that are always read only are the Created field and the Created: Date field, both of which are available on many record types.

You can update records in the following ways:

■ By editing fields inline on the List and Detail pages.

Your company administrator can enable or disable inline editing in the company profile. By default, inline editing is enabled.

TIP: In most List pages, you can open a record Detail page in a record pane in the List page without navigating away from the List page. For more information, see About the Record Pane in List Pages (on page 126) and Using the Record Pane in List Pages (on page 127).

NOTE: Sometimes, when you edit a field inline, you might be prompted to navigate to the Edit page to complete the edit. This prompt is displayed if you must edit more fields, or if a business process is attached to the field that you were editing inline.

■ By updating the record in the Edit page.

You can reach the Edit page by clicking the Edit link for a record in the List page, or clicking the Edit button for a record in the Detail page.

■ By importing records:

■ Using the Import Assistant to import record data from external comma-separated value (CSV) files if your user role has the Personal Import privilege

■ Using the Oracle Data Loader On Demand client utility

■ Using Web services to synchronise records with other applications

The type of records that you can import depends on the privileges assigned to your user role. For more information on how to import records from external CSV files and other external sources, see Import and Export Tools.

You can also edit fields in linked records on the Detail page of the main record (if inline editing is enabled). For more information on updating fields in linked records, see Updating Linked Records from Main Records (on page 111).

NOTE: You cannot use the inline edit functionality while a preview window is open, or while you are using the message centre.

The following procedure describes how to update fields inline on list pages, related information sections, and record detail pages. To allow you to update fields inline, inline editing must be enabled.

To update fields inline

1 On the record full List page, or record Detail page, move the pointer over the field that you want to update

An edit icon appears on the right-hand side of the field. A different icon appears depending on the type of field. On a Detail page, if a field is read-only, when you rest the mouse on the field, no information is displayed. Nothing happens when you click the field. On a Full List page, if a field is read-only, when you pause the pointer on the field, information is displayed. Also, a read-only Inline Editor is displayed when you click the read-only field.

2 Click the edit icon or click the field to enable the Edit mode for Inline Edit.

For some of the fields, clicking the fields is different from clicking the edit icon. If you click a Phone field, for example, the field displays a Text editor and allows you to enter the phone number directly. If you click the edit icon, it displays a Phone editor and allows the user to specify the Country, Area Code, Phone Number and Extension separately.

3 Update the value of the field.

4 Click the green check mark icon or press Enter to save the changes.

To cancel changes, click the red X icon, or press Esc.

The following procedure describes how to update record details in an Edit page.

To update record details in an Edit page

1 On the record List page, click the Edit link for the record or from the Detail page, click the Edit button in the title bar.

2 On the record Edit page, update the necessary information.

3 Save the record:

- To save this record and then open the record Detail page (where you can link information to this record), click Save.

- To save this record and then open the Edit page (where you can create another record), click Save & New.

NOTE: Your administrator can configure a field so that it is conditionally required, that is, the field is not required by default, but becomes required if the data in other fields on the record meets certain criteria. When this happens, a red asterisk (*) displays beside the field that is now a required field, and if the text label is displayed for the field, it is displayed in red text. If the field is blank, then you must update it before you save the record.

Linking Records to Your Selected Record

In Oracle CRM On Demand, you can link one record to another. Linking records gives you access to all related information from the records that you view. As an example, you can see a complete view of customer information by linking contacts, opportunities, and activities to an account record.

Linking associates records with each other so that you and others who have access rights to the record have a full view of the information.

You use Lookup windows to search for and select existing records that you want to link to the record you are working with. Depending on how your company administrator sets up the search layout for a record type for your role, the Lookup window for that record type might be populated with records when the window opens. For more information about Lookup windows and how to use them, see Searching for Records in Lookup Windows (on page 88). For information about how smart associations can help you to find a record that you want to associate with another record, see About Smart Associations and the Auto-Resolve Functionality (on page 92).

Linking New and Existing Records

From the record Detail pages, you can do one or both of the following, depending on the record types you are working with:

■ Link existing records to a main record.

■ Create new records that are automatically linked to the main record.

New records are added to the database at the same time that they are linked to the selected record. For example, an activity that you create from the Lead Detail page is linked to the lead, and then appears in the Activities pages.

NOTE: You can also edit some fields on linked records from the main record Detail page if inline editing is enabled. For information about editing linked records from the main records, see Updating Linked Records from Main Records (on page 111).

The following procedure describes how to link one or more records to your selected record in the related information section of the record Detail page.

To link an existing record to your selected record

1 Select the main record.

   For more information about selecting records, see Finding Records (on page 68).

2 On the record Detail page, scroll down to the appropriate related information section, and click Add.

   Depending on the record types that you are linking, either a multiassociation Lookup window or a list page opens.

3 Perform one of the following:

   ■ In the multiassociation Lookup window, click Select for each of the records that you want to link to your main record, and then click OK.

   ■ In the list page, click the Lookup icon next to the field to open the Lookup window, and then click Select for the record that you want to link to your main record.

The following procedure describes how to create a new record and link it to your selected record.

NOTE: Depending on the record types that you are working with, you might not be able to create a new, linked record from your selected record.

To create a new record and link it to your selected record

1 Select the main record.

For more information about selecting records, see Finding Records (on page 68).

2 On the record Detail page, scroll down to the appropriate related information section, and then click New.

NOTE: In some cases, the New button is not available in the related information section. Instead, you must click Add and then click New in the Lookup window to open the form where you can create the new record.

3 In the Edit page, create a new record and save it, by clicking either Save or Save and Continue:

- If you click Save, then Oracle CRM On Demand saves the new record and navigates you to the main record's Detail page.

- If you click Save and Continue, then Oracle CRM On Demand saves the new record and navigates you to the child record's Detail page so that you can associate additional content to the child record, for example, notes and attachments.

  NOTE: This navigation only applies to child records that can have other associated record types through related information sections. For example, attachments and notes do not have the Save and Continue button available.

In either case, Oracle CRM On Demand automatically links the new record to the main record.

The following procedure describes how to remove or delete a linked record from the related information section of the record Detail page.

To remove or delete a linked record

1 Select the main record.

For more information about selecting records, see Finding Records (on page 68).

2 On the record Detail page, scroll down to the appropriate related information section.

3 In the row for the record that you want to remove or delete, select one of the following options from the record-level menu:

- **Remove.** This option disassociates the records without deleting either of the records.

- **Delete.** This option deletes the linked record. A deleted record is moved to the Deleted Items page and is permanently removed from the database after 30 days.

NOTE: Where multiassociation Lookup windows are available, you can also remove linked records by clicking Remove for each of the linked records in the multiassociation Lookup window.

Examples of Record Types Linked to Other Record Types

The following table shows some examples of record types that you can link to other records in Oracle CRM On Demand. The Information column provides instructions on how to link the record type from the Details page of the main record.

The record types that you can link to your selected record depend on the type of record you are working with, as well as the customisation that you or your managers have made to Oracle CRM On Demand. In addition, if you are working in a particular edition of Oracle CRM On Demand, such as Oracle CRM On Demand for Partner Relationship Management or an industry-specific edition of Oracle CRM On Demand, you can link additional record types.

Record Type	Information
Account	**In the standard application, the Accounts section is available on the Detail pages for contact records. You might need to add the section to your layout:** To link an existing account and track the role it plays in relation to the contact, click Add. On the Add Account page, select an account, select the role it plays for this contact and click Save. If the account you want to add does not exist, you can add it by clicking New in the Lookup window. For field descriptions, see Account Fields (on page 286). If the account has more than one role, click Edit Roles in the appropriate row, select the roles, and save the record.
Account Partners	**In the standard application, the Account Partners section appears on the Detail pages for account records. You might need to add the section to your layout:** To link an account and track it as your partner for this record, click Add. Then enter the required information in the Edit form and save the record. For field descriptions, see Tracking Partners and Competitors of Accounts (see "Tracking Account Partners and Competitors" on page 279).
Account Relationships	See Tracking Relationships Between Accounts (on page 275).
Account Team	See Sharing Records (Teams) (on page 134).
Campaigns	**From contact records only:** To link a campaign, click Add, select the campaign and save the record. For field descriptions, see Campaign Fields (on page 236).
Competitors	**In the standard application, the Competitors section appears on the Detail pages for account and opportunity records:** To link an account and track it as your competitor for this record, click Add. Then enter the required information in the Edit form and save the record. For field descriptions, see Tracking Partners and Competitors of Accounts (see "Tracking Account Partners and Competitors" on page 279).

Record Type	Information
Contacts	**In the standard application, the Contacts section is available for activity records (tasks and appointments). You might need to add it to your layout:** To link the Primary Contact, click Edit and link the contact. To link additional contacts to the activity, scroll down to the Contacts section, click Add and link the contact records. **In the standard application, the Contacts section appears on the Detail pages for account records:** To link a new contact, click New, enter the required information in the Edit form and save the record. To link an existing contact, click Add. On the Contact List page, select a contact and click Save. If the contact you want to add does not exist, you can add it by clicking New in the Lookup window. For field descriptions, see Contact Fields (on page 311). **In the standard application, the Contacts section appears on the Detail pages for opportunity records:** To link an existing contact to your opportunity record, click Add. In the Contact List form, select a contact, define the contact's Buying Role and click Save. If the contact you want to add does not exist, you can add it by clicking New in the Lookup window. For field descriptions, see Contact Fields (on page 311). You must select a Buying Role to clarify a contact&rsquo;s responsibilities within a company, and the contact&rsquo;s influence on purchasing decisions. The Buying Role is critical for Key Role Analysis and for understanding the selling political environment. **NOTE:** You can link the same contact to several opportunities or several contacts to the same opportunity.
Contact Relationships	See Tracking Relationships Between Contacts (on page 303).
Contact Team	**From contact records only:** To allow the contact record to be visible to other employees, click Add Users. In the Contact Team Add User window, select the user's name and the user's access rights for the record (in the Contact Access field), and then save your changes. For more information on sharing records, see Sharing Records (Teams) (on page 134).
Leads	**In the standard application, the Leads section appears on the Detail pages for campaign records:** To link a new lead, click New, enter the required information in the Lead Edit form and save the record. For field descriptions, see Leads Fields (on page 256).

Record Type	Information
Notes	**In the standard application, the Notes section appears on the Detail pages for record types that support the notes feature:** To link a new note, click New, enter the required information in the record Note form and save the record. For field descriptions, see Adding Notes (on page 143).
Open Activities	**In the standard application, the Open Activities section appears on the Detail pages for a number of record types:** To link a new appointment or task, click New Appt or New Task in the title bar. Then enter the required information in the Edit form and save the record. For field descriptions, see Activity Fields (on page 222). You can link several activities to your selected record. If an activity has a time associated with it, the activity appears in the Activities list and Calendar. Users that can view the selected record can also see the activities linked to the record, including those activities owned by or assigned to others. For information about working with lists of activities, see Working with Activity Lists (on page 192). **NOTE:** Depending on the record type and on the Detail page layout that your company administrator assigns to your role for the record type, the open appointments and tasks that are linked to a record can be shown separately on the record Detail pages, in the Open Appointments related information section, and the Open Tasks related information section. Also, on some record types, an Activities related information section shows both open and completed activities.
Opportunities	To link a new opportunity, click New, enter the required information in the Opportunity Edit form and save the record. For field descriptions, see Opportunity Fields (on page 335). **NOTE:** To link an opportunity to a lead, convert the lead that is associated with the campaign to an opportunity. For more information, see Converting Leads to Accounts, Contacts, Deal Registrations, or Opportunities (on page 250).
Opportunity Partners	**In the standard application, the Opportunity Partners section appears on the Detail pages for opportunity records:** To link an account and track it as your partner for this record, click Add. Then enter the required information in the Edit form and save the record. For field descriptions, see Tracking Partners and Competitors of Opportunities (on page 322).
Referral	See Adding Referrals (on page 305).

Record Type	Information
Related Solutions	**In the standard application, the Related Solutions section appears on the Detail pages for solution records:** To add a solution, click Add Solution and select an existing solution in the Lookup window. You can add as many solutions as you like. You may want to link solutions to each other if they share related information or concern a related topic. To create a new solution, click New, complete the required information and save the record. **NOTE:** You can review linked service requests from the Solution Detail page, but you must link them from the Service Request Detail page.
Service Requests	**In the standard application, the Service Requests section appears on the Detail pages for account and contact records:** To link a new service request, click New, enter the required information in the Service Request Edit form and save the record. For field descriptions, see Service Request Fields (on page 421).
Solutions	**In the standard application, the Solutions section appears on the Detail pages for service request records:** To link a solution, click Add. In the Lookup window, you can click the Solution ID link to link an existing solution or click New to create a new solution. For field descriptions, see Solution Fields (on page 430). **TIP**: Before creating new solutions, check the Solution List page to make sure that the solution is not waiting to be published by your manager. The Lookup window shows only solutions marked Published with a status of Approved.
Team	**The Team section does not appear by default on any record detail page in the standard application, but your company administrator can add the Team section to certain record types:** To allow this record to be visible to other employees, click Add Users. In the Team Add Users window, select the user's name. **NOTE**: If the record owner is part of a Group (defined by your company administrator), the group members automatically appear in the Team Related Information section. For more information, see Sharing Records (Teams) (on page 134).
User	**The User section does not appear by default on any record detail page in the standard application, but your company administrator can add the User section to certain record types:** To track another employee involved in a task, in the Users section of the Task Details page, click Add. In the Lookup window, select the user. **NOTE**: Unlike the Team feature, if the record owner is part of a Group

Record Type	Information
	(defined by your company administrator), the group members do not automatically appear in the User Related Information section. The User list does not affect visibility to records; it is used strictly for tracking.

Updating Linked Records from Main Records

You can update fields in a linked record from the main record as follows:

- By editing fields on the linked record on the Detail page of the main record (if inline editing is enabled).

  In most cases, you can edit fields in linked records from the Detail page of the main record. However, you cannot edit the following types of fields in linked records from the Detail page of the main record:

  - Fields that are not shown in the Detail page of the linked record itself

  - Calculated fields, for example, Full Name

  - Fields that are read-only on the Edit page of the linked record

  Also, in cases where the same linked record can show up under multiple main records, the fields that are part of the relationship can be edited. However, the fields that belong to the linked record itself cannot be edited. For example, in the Account Team related list on an account record, the Team Role field can be edited, because the field is part of the relationship between the account and the team member. However, the Last Name and First Name fields cannot be edited, because they belong to the user record (of the team member).

- By opening the Edit page for a linked record from the Detail page of the main record, and updating fields on that page.

The following procedure describes how to update a linked record on the main record Detail page.

To update a linked record on the main record Detail page

- On the Detail page of the main record, scroll down to the appropriate section, and edit the fields as necessary.

  NOTE: If the record that you want to edit is not displayed on the page, click the Show Full List link to see all of the linked records of that type, and then edit the record fields in the List page.

  For more information on editing fields inline, see Updating Record Details (on page 103).

The following procedure describes how to open a linked record from the main record Detail page.

To open a linked record from the main record Detail page

1   On the Detail page of the main record, scroll down to the appropriate section.

2   Click the Edit link for the record (if one is provided), or click the name link of the linked record.

   NOTE: If the record that you want to edit is not displayed on the page, click the Show Full List link to see all of the linked records of that type.

3   When the Edit or Detail page for the linked record opens, update the record details.

   For more information on updating record details, see Updating Record Details (on page 103).

Favourite Records Page

The Favourite Records page shows your favourite records. You access the Favourite Records page by clicking Show Full List in the Favourite Records section of the Action bar. You can have a maximum of 100 records in your favourites.

NOTE: If there are already 100 records in your favourites, and you add another record to your favourites, then the record that has been in your favourites for the longest time is dropped from your favourites to allow the new record to be added.

From the Favourite Records page, you can perform the tasks shown in the following table.

To do this	Follow these steps
Change the sequence of the records	In the Favourite Records title bar, click the Manage Favourites button. On the Manage Favourites page, change the order of the records until it reflects the sequence that you want. The records then appear in the new sequence on the Action bar and the Favourite Records page.
Delete a record from the list of favourites	In the row for the record that you want to delete, click the Delete link.
Display details of a record	Click the name of the record to display the Detail page for the record.
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Show more/fewer records	In the Number of records displayed in the drop-down list at the bottom of the page, select a number of records to see at once.

Working with Lists

For many record types, you can limit the records you see by using filtered lists. A filtered list shows a subset of the records that meet the criteria making up the list.

Oracle CRM On Demand provides standard filtered lists for many record types. Users who have the Manage Public Lists privilege in their user role can create custom filtered lists and make them available for other users.

Your company administrator can determine which lists are available for your user role. You can also create additional custom filtered lists to return the records that you want to work with. For more information, see Creating and Refining Lists (on page 118). From the lists that are available to you for a top-level record type, you can choose the set of lists that is shown in the Homepage and in picklists of lists. For more information, see Changing Sets of Lists for Record Types (on page 129).

When you select a filtered list, the list of records that meet the list criteria opens in the record List page. You can choose to display the first 5, 10, 25, 50, 75, or 100 records in the page at one time. The option you choose is maintained in the List pages for all record types, until you change it again. When you browse a list, the record on which your pointer is resting is highlighted by a change in the background colour.

Depending on your company set-up and the set-up in your user profile, the column headings in List pages might always remain in view when you scroll down a page of records. This feature can be turned on or off at company level, but you can override the company-level Freeze List Column Header setting in your personal profile. For information about changing the Freeze List Column Header setting in your personal profile, see Updating Your Personal Details (on page 836).

NOTE: Oracle CRM On Demand can use only one method of collation to determine the sort order within lists. The collation method was chosen to provide the best solution for all languages. However, it can result in some letters appearing in the wrong order in some languages.

What Happens If There Is More Than One Page of Records?

If there are more records in the list than can be shown on one page, then the following occurs:

- You can click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.

- If you click the icon to go to the last page in a list, then the last page shows a full page of records, and the number of records shown on the last page in the list is determined by the number of records that you choose to display in your list page.

  For example, assume that a list has a total of 60 records, and you choose to display 25 records in your list page. If you click the icon to go to the last page in the list, then the last 25 records in the list are displayed on the page.

- If you navigate through a list one page at a time, then the last page in the list shows only the remaining records in the list.

  For example, assume that a list has a total of 60 records, and you choose to display 25 records in your list page. If you navigate through the list one page at a time, then each of the first two pages of the list shows 25 records, and the last page shows the remaining 10 records in the list.

Tasks That You Can Perform from the List Pages

From the List pages, you can do the following:

- Sort the records.

- Review multiple records at a glance.

- Find a record to review, delete or update.

- Update the fields on the List page inline, if the inline edit functionality is enabled.

- Open a record Detail page in the record pane and update the record details without navigating away from the List page, if the record pane is available in the List page.

- Create new records.

- Add the list to the Favourite Lists section in the Action bar by clicking the Favourites icon.

- Refine the list within the List page, if the Toggle Refine List Pane icon is available. For more information, see Refining Lists Within List Pages (on page 125).

- Change the order of the columns in the list, by dragging the column headings to a new location and dropping them. You can optionally save the list after you change the order of the columns.

About Reordering Columns in List Pages

You can reorder the columns in a list directly in the List page. When you hover over a column heading, a four-directional arrow appears, and you can then drag the column to the new location and drop it. If more columns are available than can be displayed on your browser page, then when you drag a column header to the edge of the displayed columns, the page automatically scrolls to display the additional columns. The changed order of the columns continues to apply when you perform actions that refresh the page, such as paging through the list, sorting the list, using the Alpha Search controls and Quick Filter fields, and so on. The changed order also continues to apply if you open a record Detail page from the list and then return to the list. However, after you navigate away from the list, the next time you open the list, the columns appear in the original order unless you saved the list after you reordered the columns.

About Using Custom Fields to Sort Lists

For performance reasons, some custom fields cannot be used to sort lists. The following general rules apply:

- You cannot use the following types of custom fields to sort lists of any record type, including the custom object record types:

    - Check box fields

    - Web link fields

    - Multi-select picklist fields

    However, for any given record type, there might be other types of custom fields that you cannot use to sort lists.

- For the Custom Object 01 through 03 record types, you cannot use any type of custom field to sort lists.

Actions That You Can Perform on the Listed Records

In addition, you can use the record-level menu (beside each record name) to perform various actions on the listed records, including some or all of the following:

- Open the Edit page for the record (by selecting the Edit option), where you can edit all of the fields on the record.

- Create a new record by copying the existing record. Your company administrator determines which field values are automatically copied to the new record.

- Delete a record.

You can filter the list further if there are too many records on the page. For more information about quick ways of filtering your lists, see Filtering Lists (on page 123).

Each filtered list is specific to the record type, such as Opportunities or Accounts. All employees can create filtered lists for their own use, but you need to be assigned the appropriate role to create public lists that are available to all employees.

NOTE: A list that you or your managers create only appears in the language in which it is created. If you switch languages, it is not added to the lists in the other languages that the application supports. Only the default filtered lists appear in all languages. For example, if an Italian manager creates a new list and some of her team uses the Spanish version of the product, her team members will not see the newly-created list.

About Creating Bookmarks for List Pages

In most lists, the pages in the list share the same URL. As a result, when you create a bookmark for a page within a list, the bookmark always opens the list at the page that opened when you first accessed the list (usually the first page in the list). Similarly, when you copy the URL from the address field of a page within a list and later paste the URL into your browser address field, the list opens at the page that opened when you first accessed the list.

For example, when you open a list from a list link on the Account Homepage, the list opens at the first page. If you navigate to the third page in the list and create a bookmark for that page, then the new bookmark will open the list at the first page (that is, the page that opened when you first accessed the list).

List Management Options

In the List page for most record types, there is a Menu button with some or all of the following options:

- **Batch Delete**. Delete all the records from a list, see Deleting and Restoring Records (on page 161).
- **Batch Assign Book**. Add records to a book or remove records from a book, see Assigning Records to Books.
- **Export List.** Export a list to save on your computer, see Exporting Records in Lists (on page 131).
- **Mass Update**. Update a number of records in one go, see Updating Groups of Records (on page 137).
- **Mass Call Planning**. Create a planned call for one or more customers, see Mass Call Planning (on page 204).
- **Mass Create Appointment.** Create an appointment for one or more accounts, see Creating Appointments for Multiple Accounts (on page 285).
- **Record Count.** Count the records in a list, see Counting Records in Lists (on page 131).
- **Refine List**. Refine a filtered list, see Creating and Refining Lists (on page 118).

  NOTE: In the List pages for most record types, you can also refine the list without leaving the List page, and optionally save the refined list. For information about refining lists within List pages, see Refining Lists Within List Pages (on page 125).
- **Save List**. Saves a list. When you click Save List, this brings you directly to a page with Save options.
- **Show List Filter**. Show the key information for a list, see View List Page (on page 129). You can also access this page by clicking View in the Manage Lists page.

- **Create New List**. Create a new filtered list, see Creating and Refining Lists (on page 118).
- **Manage Lists**. Manage the lists for the record type, see Manage Lists Page (on page 128).
- **Batch Restore**. Restore a deleted list of records, see Deleting and Restoring Records (on page 161).

Accessing the List Management Options

The way in which you navigate to the list management options varies with the record type as shown in the following table:

Record Type	Steps
Main record types (on tabs)	**1** Click the record tab at the top of the page. **2** In the Lists section, click a list. **3** Click the Menu button and select the required option. You can also access the New List page as follows: **1** Click the record tab at the top of the page. **2** In the List title bar, click the New button. **NOTE:** Communication Lists are lists for specific types of activities. Therefore, use the Activities List page to create additional Communication Lists. Communication lists are only available if your company uses the call centre,
Activities	**1** Click the Calendar tab. **2** In the Open Tasks section, click the Show Full List link. **3** Click the Menu button and select the required option.
Alerts	**1** Click the Home tab. **2** At the bottom of the Alerts section on My Homepage, click the Show Full List link. **3** Click the Menu button and select the required option. **NOTE:** If there are no alerts, the Show Full List link does not appear.

Record Type	Steps
Attachments	Available only if your role includes the Manage Content - Manage Attachments and Detail Page Images privilege. 1 At the top of any page, click the Admin global link. 2 Click the Content Management link. 3 On the Content Management page, click the Manage Attachments link. 4 On the Manage Attachments page, click the Create New List button.
Users	Available only if your role includes the Manage Users privilege. 1 At the top of any page, click the Admin global link. 2 Click the User Management and Access Controls link. 3 Click the User Management link. 4 Click the Menu button and select the required option.
Product Categories	Available only if your role includes the Manage Content privilege. 1 At the top of any page, click the Admin global link. 2 Click the Content Management link. 3 On the Content Management page, click the Product Categories link. 4 Click the Menu button and select the required option.
Products	Available only if your role includes the Manage Content privilege. 1 At the top of any page, click the Admin global link. 2 Click the Content Management link. 3 On the Content Management page, click the Products link. 4 Click the Menu button and select the required option.

Standard Filtered Lists

For a description of the standard filtered lists, see the Working with the *record type* Homepage topic for each record type; for example:

- Working with the Leads Homepage (on page 243)
- Working with the Account Homepage (on page 265)
- Working with the Contacts Homepage (on page 290)
- Working with the Opportunity Homepage (on page 318)
- Working with the Service Request Homepage (on page 415)

To open a list

1   Click the record tab.

    NOTE: For lists of activities, click the Calendar tab and then click Show Full List in the Open Tasks section. For information about working with lists of activities, see Working with Activity Lists (on page 192).

2   From the Lists section on the record Homepage, select the list that you want to work with.

Related Topics

See the following topics for related information:

- About the Record Pane in List Pages (on page 126)
- Using the Record Pane in List Pages (on page 127)

Creating and Refining Lists

When you create or refine a list of records, your user role determines which fields you can search and which fields you can display in the list, as follows:

- If the All Fields in Search and Lists privilege is enabled on your user role, then you can search all of the fields that your company administrator makes available in the search layout that is assigned to your user role for the record type.

    NOTE: It is recommended that company administrators do not enable the All Fields in Search and Lists privilege for most user roles. When the privilege is not enabled, fields that your company does not use are not visible in search and list pages. This reduces clutter and makes it easier for users to see the fields that they are most interested in.

- If the All Fields in Search and Lists privilege is not enabled on your user role, then you can search a field only if it meets both of the following criteria:

    - The field is available in the search layout that is assigned to your user role for the record type.

    - The field is displayed on the Detail page layout that is assigned to your user role for that record type. If dynamic page layouts are defined for your role, then the field must be displayed on at least one of the dynamic page layouts.

    NOTE: *Dynamic layouts* are page layouts that show different sets of fields for different records of the same record type, depending on the picklist value that you select in a certain field on the record.

◼ When you refine an existing list, some of the fields in the search criteria for the list might not be available to your user role. Any such restricted fields are greyed out, and you cannot edit them. You can remove the restricted fields from the search criteria before you run or save the list. If you run or save the list without removing the restricted fields from the search criteria, then Oracle CRM On Demand automatically removes the restricted fields from the search criteria before running or saving the list.

NOTE: Your company administrator can change the sets of fields that are available in the search layouts for your user role at any time. If your company administrator removes a field that was previously available to you for searching, then the next time that you refine a list with a filter that contains that field, you cannot save the list with that field in the filter. If you do not remove the field from the filter, then Oracle CRM On Demand automatically removes the field from the filter before running or saving the list.

Your User Role Determines Which Fields You Can Display in the List of Records

Your user role also determines which fields you can display in the list of records that is returned by the search, as follows:

◼ If the All Fields in Search and Lists privilege is enabled for your user role, then you can select any field to display as a column in the list of records that is returned by the search.

◼ If the All Fields in Search and Lists privilege is not enabled for your user role, then you can select a field to display as a column in the list of records that is returned by the search only if the field is displayed on the Detail page layout that is assigned to your user role for the record type. If dynamic page layouts are defined for your role, then the field must be displayed on at least one of the dynamic page layouts for the record type.

Before you begin. When you create a list, you need to enter the fields and values for the criteria that you set up. You might want to first go to the record Edit page, and write down the exact field names and values as they are used in Oracle CRM On Demand. Otherwise, your filtered list might not pick up the correct records. Alternatively, you can print the record Detail page to capture the exact field names. However, the printout does not capture the field values for drop-down lists.

To set up a list

1 Create a new list or navigate to the Refine List page for an existing list.

In the List page for most record types, there is a Menu button that includes the options to create a new list or refine an existing list. For more information about accessing list management options, see Working with Lists (on page 112).

NOTE: In the List pages for most record types, you can also refine the list without leaving the List page, and optionally save the refined list. For information about refining lists within List pages, see Refining Lists Within List Pages (on page 125).

2 In the New List page or the Refine List page, in the Search In section, select one of the following options:

◼ Record Set

◼ Book

NOTE: The Search In section is not displayed for record types that do not have owners, for example, the Product record type and the User record type. The Book option in the Search In section is available only if the Book feature is enabled for your company.

3 If you select the Record Set option, select one of the following from the list in the Record Set field:

- **All records I can see.** Includes records that you have at least View access to, as defined by your reporting hierarchy, the access level for your role and the access level for shared records.

- **All records I own.**

- **All records where I am on the team**. Includes only records in the filtered list where one of the following applies:

  - You own the records.

  - The records are shared with you by the owner through the Team feature.

  - The records are shared with you through the group assignment feature for accounts, activities, contacts, households, opportunities, and portfolios.

- **All records I or my subordinates own**.

- **All records where I or my subordinates are on the team**

- **My Default Book**. Your default setting for the Book selector, as defined by your company administrator.

4 If you select the Book option, select a book, user, or delegate in the Book selector.

For more information, see Using the Book Selector (on page 93).

5 In the Choose Case Sensitivity section, select the Case Insensitive checkbox, if required.

If this check box is selected, then certain fields become case-insensitive for the search. These fields are shown in blue text in the Enter Search Criteria section.

6 In the Enter Search Criteria section, perform the following:

a (Optional) If you are refining an existing list filter that contains a search field that is not available to your user role, remove the search field from the list by clicking the X icon beside the field row.

If a search field in the list filter is not available as a search field for your user role, then the field is greyed out, you cannot edit it, and an X icon appears beside the field. You can remove the restricted fields from the list filter. If you run or save the list without removing the restricted fields from the filter, then Oracle CRM On Demand automatically removes the restricted fields from the filter before running or saving the list.

b Select a field from the Field list.

The fields are prepopulated with the targeted search fields for the record type.

NOTE: If your company administrator does not make any search fields available in the search layout that is assigned to your user role for a record type, then you cannot specify any search criteria for a list of records of that record type.

Certain fields are optimised to improve performance during searches and when sorting lists. These optimised fields are shown in green text in the list of search fields. If your search criteria include a field that is not optimised for searching, your search might be slower.

NOTE: The fields that are shown in purple text in the Enter Search Criteria section are always case-insensitive, regardless of the setting of the Case Insensitive check box. These fields are not optimised for fast searches.

If the address field you need does not appear in the drop-down list, select the corresponding one shown in the following table or in About Countries and Address Mapping.

NOTE: The fields listed in this table might not apply to all countries or locales.

To filter your list on this field	Select this field from the drop-down list
Street Number Address 1 Chome	Number/Street
Ku	Address 2
Floor District	Address 3
Shi/Gun	City
Colonia/Section CEDEX Code Address 4 URB Township	PO Box/Sorting Code
MEX State BRA State Parish Part of Territory Island Prefecture Region Emirate Oblast	Province
Island Code Boite Postale Codigo Postal	Zip/Post Code

c   Enter the conditions, filter values and operators (AND, OR) that define the filter.

If you are refining a list, the fields are already populated with criteria that you can further refine.

For information about using filter conditions, see About Filter Conditions (on page 71).

TIP: To create a list of service requests that do not have an owner, select the Owner ID field, the Equal to filter condition, and leave the value blank. You can create other null lists using this general approach.

CAUTION: When entering Filter Values, check to make sure that you are following the rules described in About Filter Values (on page 77). Otherwise, the correct records might not be included in the list.

Examples

Accounts: If you want to create a filtered list of accounts in the UK with annual revenue over $100,000,000.00, complete the form as follows:

Field	Condition	Value(s)	
Annual Revenue	Greater than	100000000	AND
Country	Equal to	Canada	

Leads: If you want to create a filtered list of leads with potential revenue over $100,000.00 and ratings of A or B, complete the form as follows:

Field	Condition	Value(s)	
Potential Revenue	Greater than	100000	AND
Rating	Less than	C	

7 In the Display Columns section, choose the fields to display as columns in the search results by moving fields from the Available Fields list to the Selected Fields list. Use the up and down arrows to change the order of the selected fields.

TIP: After the list of records is returned, you can quickly change the order of the columns in the list by dragging the column headings to a new location and dropping them. You can optionally save the list after you change the order of the columns.

8 In the Sort Order section, in the Sort by drop-down list, select a default sort field, and click Ascending or Descending to select a sort order.

Certain fields are optimised to improve performance during searches and when sorting lists. These optimised fields are shown in green text in the list of sort fields. If you select a field that is not optimised as the default sort field, your search could be slower.

NOTE: You cannot select a field of type check box as the sort field in this step. However, after the list is created, you can click the column header to sort the fields based on the values in the check box.

9 (Optional) To see the results of your search criteria without saving the list, click Run.

The List page appears displaying the results of your search criteria. You can then click the Menu button in the title bar, and select Save List or Refine List to save your list.

10 Click Save, and complete the fields in the Save options section:

Field	Comment
List Name	Type a name for the list (50-character limit). You can use any symbols or punctuation marks except quotation marks (""") in your List Name. Created lists are arranged in ascending ASCII code order, which means that the sort order is case sensitive. So, all of the list names

Field	Comment
	that start with an uppercase letter appear before the list names that start with a lowercase letter.
Description	Enter a description of up to 251 characters.
List Accessibility	If your user role includes the Manage Public Lists privilege, select one of these options:
	■ **Private.** Allows you alone to see the filtered list.
	■ **Public.** Makes the list available to all employees. Public lists appear on the record Homepage for all employees at your company.
	■ **Role Specific**. Make the list available to users with a specific role only.

1 Click Save and Run.

The filtered list that you created appears in the drop-down list in this page's title bar and in the Lists section of the record Homepage.

TIP: If a message appears indicating that your list request has timed out, refine your list criteria further and try again. You can find more information about optimising searches and lists on the Training and Support Centre Web site, which you can access by clicking the Training and Support global link at the top of each page in Oracle CRM On Demand.

Filtering Lists

In a List page, you can quickly filter the records in the list in two ways:

■ Using the Alpha Search controls to filter on a particular column

   NOTE: If your user language is Korean, Japanese, Simplified Chinese, or Traditional Chinese, then the Alpha Search controls are not available.

■ Using the Quick Filter fields

By default, the list pages show the Alpha Search controls when they are available, but you can click the filter toggle icon to show the Quick Filter fields. To switch back to the Alpha Search controls, you can click the ABC icon. The search controls that are displayed persist across different sessions.

NOTE: The Alpha Search controls and the Quick Filter fields that you typically use to filter a list are not available while the record pane is open. If you want to filter the list, then you must close the record pane. For information about the record pane, see About the Record Pane in List Pages (on page 126) and Using the Record Pane in List Pages (on page 127).

You can also restrict the records that are searched by selecting a book or user from the Book selector. For more information, see Using the Book Selector (on page 93).

For more advanced filtering, you can refine the list criteria. For more information, see Refining Lists Within List Pages (on page 125) and Creating and Refining Lists (on page 118).

Alpha Search

An arrow next to a column header in the list indicates that the column is used for sorting and filtering the list and also indicates whether the list is sorted in ascending or descending order. You can change the column that is used for sorting and filtering the list by clicking the column header of the column that you want to use.

If the Alpha Search controls are available, you can do the following:

■ Click a letter in the Alpha bar to show only records that begin with that letter.

■ Enter characters in the text field, and click Go to filter the list to show only records beginning with those characters. You can use wildcards, see About Filter Values (on page 77).

Alpha Search is case insensitive and does not affect the Refine List search criteria.

Occasionally, the Alpha bar is not active; that is, its characters are not hyperlinks because the default sort order is based on a column that the Alpha bar does not work with. For example, the default sort order for the Deleted Items page is based on the Type column, which is not sortable. Therefore, the Alpha bar is not active. However, if you click the Name column header, then the data is sorted, and the Alpha bar is activated.

Quick Filter Fields

With Quick Filter fields, you can filter the list to show records where a selected field meets particular filter criteria.

In the Show Results Where section of the List page, you select or enter values from left-to-right in the fields to specify respectively the search field, filter condition, and filter value (if the filter condition requires a value). The values available in the filter condition list vary according to the search field you select. For information about the filter conditions available, see About Filter Conditions (on page 71).

The filter value field changes to match the field type. For example, a calendar icon is displayed when you want to select a date, and a telephone icon is displayed when you want to specify a telephone number. The filter value field is hidden when no value is required with the filter condition. For text and telephone fields, you can use wildcards, see About Filter Values (on page 77).

You can use any of the fields that your company administrator makes available as search fields in the search layout for the record type for your user role to filter the list of records. If your company administrator does not make any search fields available in the search layout, then you cannot use the Quick Filter fields.

NOTE: If the search criteria for the list of records that you want to filter include a field that is not one of the search fields defined in the search layout for the record type for your user role, then you cannot use the Quick Filter fields.

Searches in Quick Filter fields do not affect the Refine List search criteria. Also, searches in Quick Filter fields are case-sensitive for most fields. However, some fields are always case-insensitive. These fields are shown in purple text.

TIP: When working with a list, you can refine the list so that searches in some additional fields are case-insensitive. When you select the Case Insensitive check box in the Refine List page and then run the list from the Refine List page, the fields that become case-insensitive are shown in blue text in the Quick Filter fields. However, after you navigate away from the list, the next time you open the list, the searches in all of the fields for the list are case-sensitive again, with the exception of the fields that are shown in purple text. For your private custom lists and for public custom lists that you create, you can select the Case Insensitive check box, and then save the list, so that the relevant fields are permanently case-insensitive.

To use Quick Filter fields to filter a list

1 Select a field in the drop-down list to the right of the Show Results Where label.

2 Select a condition from the filter condition drop-down list.

3 If required, enter a value in the filter value drop-down list.

4 Click Go.

Refining Lists Within List Pages

In many List pages, you can open the Refine List pane within the List page and then change the search criteria for the list without leaving the List page. You can also change the set of fields that is displayed in the List page.

To refine a list within a List page

1 In the List page, click the Toggle Refine List Pane icon:

2 In the Refine List pane, change the search criteria, the fields to be displayed, and the sort order to meet your requirements.

For more information about refining lists, see Creating and Refining Lists (on page 118).

3 Click Run to refresh the list of records.

4 To close the Refine List pane, click the Toggle Refine List Pane icon again.

When refining lists within List pages, the following considerations apply:

◼ The Save button is not available within the Refine List pane. If you want to save the refined list after you run it, then you must select the Save List option from the Menu button in the title bar of the List page.

◼ You cannot change the record type that is searched. To search for a record of a different record type, you must open an existing list of records of that type or start a new search, for example, by clicking Advanced in the Search section of the Action bar.

◼ The following features are not available in the List page while the Refine List pane is open within the page:

◼ The Quick Filter fields.

◼ The Book selector. However, you can select a book in the Refine List pane.

About the Record Pane in List Pages

In many List pages, you can open a record in the record pane without navigating away from the List page. Within the record pane, you can work with the record, as long as you have the necessary access rights for the record. For example, you can do the following:

■ View the record details.

■ View the related information sections for the record.

■ Edit the fields on the record and in the related information sections of the Detail page, if the inline edit functionality is enabled.

■ Preview linked records, using the record preview functionality.

■ Delete the record.

The record pane functionality is available in most lists of records in Oracle CRM On Demand. Certain lists do not support the record pane. If the record pane is supported for a list, and if there is at least one record in the list, then you see the Toggle Record Pane icon on the right-hand side of the title bar in the List page:

If a list does not support the record pane, then the Toggle Record Pane icon is not available in the List page.

NOTE: The record pane is not supported in any of the lists that you access through the administration pages in Oracle CRM On Demand.

Considerations That Apply When Working in the Record Pane

When working in the record pane, note the following points:

■ **Custom code and custom Web applets.** Your administrator can use custom code and custom HTML head additions to customise pages in Oracle CRM On Demand. For example, your administrator might add a custom button to a record Detail page, or add a custom Web applet that contains custom code to the page. In some cases, such customisations might not work as expected when you work with the record in the record pane.

■ **Updating and refreshing the record in the record pane.** If another user updates the record while you have it open in the record pane, then a message appears when you try to update the record. If that happens, then you must refresh the record in the record pane by clicking the row for the record in the list section of the page again.

■ **Deleting records in the record pane.** If you delete the record in the record pane, then the record pane closes. The list refreshes, and the record is no longer available in the list.

■ **Actions that navigate away from the List page.** In the record pane, if you click a link that opens another page in Oracle CRM On Demand, such as the Show Full List link in a related information section, or if you click a button to perform an action such as creating a new record, then a new page opens. The new page replaces the List page. If you want to return to the list, then you can use the Back link to navigate back to the list.

■ **List navigation and inline editing.** The following considerations apply to the list section of the page:

◼ The navigation icons at the top or bottom of the list section that allow you to move to the next page, previous page, first page, or last page of the list are available when the record pane is open. However, if you have a record open in the record pane, and if you navigate to another page in the list, then the record closes. The record pane remains open.

◼ You cannot edit fields inline in the list section of the page while the record pane is open.

◼ The Alpha Search controls and the Quick Filter fields that you typically use to filter a list are not available while the record pane is open. If you want to filter the list, then you must close the record pane.

◼ You cannot sort the list while the record pane is open. If you want to sort the list, then you must close the record pane.

◼ You cannot change the number of records displayed in the List page while the record pane is open. If you want to change the number of records displayed in the List page, then you must close the record pane.

Related Topics

See the following topic for related information:

◼ Using the Record Pane in List Pages (on page 127)

Using the Record Pane in List Pages

This topic describes how to open and work with records in the record pane in List pages.

The following procedure describes how to open the record pane in a List page.

To open the record pane in a List page

◼ Click the Toggle Record Pane icon:

The record pane opens. The first column of the list remains visible in the list section of the page.

The following procedure describes how to open a record in the record pane.

To open a record in the record pane in a List page

◼ In the list section of the page, click the row for the record that you want to open in the record pane.

The record opens in the record pane. In the list section of the page, the first column of the list remains visible, and the row for the record that you opened is highlighted.

The following procedure describes how to show a different column in the list section of the page while the record pane is open.

To show a different list column in the list section of the page

■ In the list header, click the Select Column to be Displayed icon (a down arrow within a circle), and then select the name of the column that you want to display.

The column that you selected appears in the list section of the page. The row for the record that is currently open in the record pane is highlighted in the list.

The following procedure describes how to close the record pane.

To close the record pane

■ Click the Toggle Record Pane icon.

The record pane closes. The List page remains open.

Related Topics

See the following topic for related information:

■ About the Record Pane in List Pages (on page 126)

Manage Lists Page

The Manage Lists page shows the filtered lists for a specific record type:—those lists that you created, the lists your managers created for you to use, as well as lists provided by the system. You can access the Manage Lists page by selecting Manage Lists from the Menu button on a list page. For more information about accessing list management options, see Working with Lists (on page 112).

From this page, you can perform the tasks shown in the following table.

To do this	Follow these steps
Add a list to Favourite Lists	In the row for the list, click the Add to Favourites icon.
Change the set of lists that appears on the record Homepage and in picklists of lists	For information about changing sets of lists, see Changing Sets of Lists for Record Types (on page 129).
Create a filtered list	In the Manage Lists title bar, click New List. On the New List page, enter the required information and save the record.
Delete a list	In the row for the list that you want to delete, click Delete. You can only delete lists that you created.
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select the number of records to be seen at any one time.

To do this	Follow these steps
Update a list	In the row for the list you want to update, click Edit. This opens the Refine List page, where you can update the list. **NOTE:** You cannot change the standard filtered lists distributed with the application, or the filtered lists that were saved before the updating capability became available.
View the key information and filter information for a list	In the row for the list, click View. This action opens the View List page.

View List Page

The View List page displays the following information:

■ **Key list information**. The name and description of the list and also:

    ■ **List accessibility**. The visibility of the list indicating whether it is private, public, or specific to a user role.

    ■ **Search In**. The subset of records that are searched to filter the list.

■ **Filter information**. The fields, filter conditions, and filter values used to produce the filtered list.

■ **Selected Fields**. The fields selected to display as columns in the search results, and the sort order of the field selected as the default search field.

You access the View List page by selecting Show List Filter from the Menu button on a list page. For more information about accessing list management options, see Working with Lists (on page 112).

Changing Sets of Lists for Record Types

Your company administrator can determine which lists are available for your user role. You can also create custom lists for your own use, for more information, see Creating and Refining Lists (on page 118). From the lists that are available to you for a top-level record type, you can choose a set of lists that is shown in the following locations:

■ In the Homepage for the record type, if the record type has a Homepage. The Homepage shows a maximum of the top ten lists from your set of lists for the record type.

■ In the picklist of lists in List pages for the record type.

■ In the *record type* List field in Lookup windows for the record type, where *record type* is the name of the record type that you are searching for in the Lookup window.

    The availability of the *record type* List field in Lookup windows is controlled by the Record-Type Lists in Lookup Windows menu in the company profile. For more information about this menu and what it controls, see Searching for Records in Lookup Windows (on page 88) and Setting Up Your Company Profile and Global Defaults.

NOTE: If the *record type* List field is available in Lookup windows, then the first list in the set of lists in the *record type* List field is active by default when a Lookup window opens. If some context-sensitive lists are available in the Lookup window, and the search layout for your user role specifies that the context-sensitive lists appear at the top of the set of lists in the *record type* List field in the Lookup window, then the first available context-sensitive list is active by default when the Lookup window opens. If the *record type* List field is not available in Lookup windows, then the initial search for a record of a given record type in a Lookup window is performed on all records of that record type that you can access.

In addition to choosing a set of lists for a record type, you can also determine the order of the lists within the set. It is recommended that you place the lists that you use most often at the top of your set of lists.

To change your set of lists for a record type

1 Open a list of records of the record type. For information about opening lists, see Working with Lists (on page 112).

2 In the Manage Lists page, click List Order.

3 In the List Display Order page, do the following:

■ To add a list to the set of lists, use the directional arrow to move the list from the Available Lists section to the Lists to Appear on Homepage section.

   NOTE: Lists that remain in the Available list do not appear on the Homepage, in the picklist of lists in List pages, or in the set of predefined lists in Lookup windows.

■ To remove a list from the set of lists, use the directional arrow to move the list from the Lists to Appear on Homepage section to the Available Lists section.

■ To change the order of the lists within the list set, use the directional arrows to move the lists up or down in the Lists to Appear on Homepage section.

   TIP: Remember that the lists that you want to appear on the Homepage for the record type must be in the top ten lists in the Lists to Appear on Homepage section. However, all of the lists in the Lists to Appear on Homepage section are available in the set of predefined lists in Lookup windows.

4 Save your changes.

NOTE: When you create a custom list, you might want to update your set of lists to move the new list to a different location in the set of lists or to remove it from the set of lists.

Favourite Lists Page

When you click the Show Full List link in the Favourite Lists section of the Action Bar, the Favourite Lists page opens, showing your favourite lists. You can have a maximum of 100 lists in your favourites.

NOTE: If there are already 100 lists in your favourites, and you add another list to your favourites, then the list that has been in your favourites for the longest is dropped from your favourites to allow the new list to be added.

The following table describes the tasks that you can perform from the Favourite Lists page.

To do this	Follow these steps
Change the sequence of the lists	In the Favourite Lists title bar, click the Manage Favourites button. On the Manage Favourites page, change the order of the lists until it reflects the sequence that you want. The lists appear in the new sequence on the Action bar and the Favourite Lists page.
Delete a list from the list of favourites	In the row for the list that you want to delete, click the Remove link.
Display a list	Click the name of the list to display the List page from which you can work with the list.
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select the number of records to be seen at any one time.

You can embed Favourite Lists as a Web widget in other applications. For more information, see Embedding a Favourite Lists Widget (on page 872).

Counting Records in Lists

The following procedure describes how to count the records in a list.

To count the records in a list

- On the record List page, click Menu, then select Record Count.

NOTE: If there are more than 1000 records in the list, then the count operation fails, and a message is displayed indicating that too many records match your search criteria. If this happens, refine your list so that fewer records are returned. If the count operation takes more than 30 seconds, then the operation fails. If this happens, try again later, or refine your list so that fewer records are returned. For more information about refining lists, see Creating and Refining Lists (on page 118).

Exporting Records in Lists

You can export the records that meet the criteria that you set up in a list. After Oracle CRM On Demand exports the list of records, you can save it by downloading the file.

NOTE: Oracle CRM On Demand retains your export results for 168 hours (7 days). After that, you must export the list again.

You can export up to 250 records from a list immediately. When you select this option, the top records from the list (based on the current sort order of the list) up to a maximum of 250 are exported. Or, you can export all of the records in a list. When you export all of the records in a list, your export request is queued and executed as a batch job.

To export records from a list, your user role must include either the List - Export all Fields privilege or the List - Export Displayed Fields privilege. When you export a list of records, your user role determines which fields you can export, as follows:

- If the List - Export all Fields privilege is enabled on your user role, then you can choose to export all of the fields on the records, or to export only the fields that are displayed in your list.

- If the List - Export Displayed Fields privilege is enabled on your user role, but the List - Export all Fields privilege is not enabled, then you can export only the fields that are displayed in your list.

The following procedure describes how to export up to 250 records in a list.

To export up to 250 records in a list

1   Open the list of records that you want to export.

2   If necessary, sort the list so that the records that you want to export appear at the top of the list.

    TIP: To sort the list by column, click the column heading. To sort the list by the same column but in reverse order, click the column heading again.

3   On the record List page, click Menu, and select Export List.

4   On the Export List page:

    - In the Export Type section, select the Immediate Export option.

    - In the Fields to Export and Field Delimiter sections, select the options that you want.

        NOTE: The Fields to Export section is available only if your user role has the List - Export all Fields privilege.

5   Click Export.

6   Click Download to download the file.

NOTE: If you select Immediate Export in the Export Type section, then no email notification is sent when the export process is complete.

The following procedure describes how to export all of the records in a list.

To export all of the records in a list

1   Open the list of records that you want to export.

2   On the record List page, click Menu, and select Export List.

3   On the Export List page:

    - In the Export Type section, select the Queued Export option.

    - In the Fields to Export and Field Delimiter sections, select the options that you want.

NOTE: The Fields to Export section is available only if your user role has the List - Export all Fields privilege.

■ Select the Enable Email Notification (applicable to Queued Export only) check box if you want an email notification to be sent after the export process is complete.

NOTE: This check box is selected by default and is only applicable if you perform a queued export.

■ Select the Include Weblink URL in Export Files check box if you want URLs to be included in the exported CSV file.

The default value of the Include Weblink URL in Export Files check box is controlled by the Include Weblink URL in Export Files check box in the company profile. You can choose to select or to deselect this setting for each export request. For more information about this check box, see Configuring Integration Settings.

4 Click Export.

The Personal Export Request Queue page appears.

5 If the export request is in the Pending Requests section of the page, click Refresh to see if your update request has completed.

6 When your export request appears in the Completed Requests section of the Personal Export Request Queue page, click the List or Record Type link to open the List Export Request Detail page.

7 In the Export Request Attachment section of the page, in the row that contains the ZIP file you want to download, select Download from the record-level menu.

The ZIP file consists of an export summary text file and CSV file for each type of record that you exported.

The ZIP files of lists that are exported as queued requests are available through your Personal Export Request Queue page for 168 hours after the export request is completed. For more information about the Personal Export Request Queue page and how to access the ZIP files, see Viewing Your Export Requests (on page 870).

Transferring Ownership of Records

You own a record when your name is in the Owner field. Typically, you can view and edit all records that you own.

Depending on the record ownership mode that your company administrator configures for a record type, you might automatically become the owner of a record when you create the record. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

You also become the owner of a record when any of the following happens:

■ The record is assigned to you.

■ You are in a group that owns the record. With group ownership, your name might not appear in the Owner field.

You can transfer the ownership of most records if:

- You own the record.

- One of your direct reports owns the record.

- Your user role and access levels permit it.

NOTE: For account, contact and opportunity records only, you can also transfer the ownership if the record owner has granted you full-access rights to that record.

To transfer ownership of a record

1 Select the record.

For instructions on selecting records, see Finding Records (on page 68).

2 On the Detail page, click Edit to open the Edit page.

NOTE: If the inline edit feature is enabled for your company, you do not have to open the Edit page. Instead, you can edit the Owner field directly on the Detail page.

3 Click the Lookup icon next to the Owner field.

4 In the Lookup window, click the Last Name link of another employee.

5 Save the record.

Sharing Records (Teams)

For some record types, you can share a record so that a team of users can view it. The following record types can be shared by teams:

- Account

- Accreditation

- Application

- Business Plan

- Certification

- Contact

- Course

- Custom Objects

- Deal Registration

- Event

- Exam

- Household

- Lead

- MDF Request

- Objective

- Opportunity

- Order

- Partner

- Portfolio

- Sample Request

- Service Request

- Special Pricing Request

With account records, you can also share the contact and opportunity records that are linked to that account record.

About Teams and Record Ownership Modes

Depending on the record ownership mode that your company administrator sets up for the record type, a record might not have an owner. The record might instead have a primary custom book or might have no owner or primary custom book. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47). Record ownership modes apply only to record types that support books.

If your company administrator changes the record ownership mode for a record type, then a record that previously had an owner might have the owner removed from the record the first time that the record is updated after the record ownership mode changes. When this happens, all the members of the team, except the former owner of the record, remain as members of the team. The behaviour is the same for team members who are members of a predefined group; that is, all of the members of the group, except the former owner of the record, remain as members of the team. However, the Account record type is an exception to this rule. If the former owner of an account is a member of a predefined group, then all of the members of the group are removed from the team. Any team members who are not members of the predefined group remain as members of the team, as is the case with other record types.

NOTE: In the standard application, the former owner of the record is not retained as a member of the team, as described here. However, your administrator can configure the record type so that the former owner of the record is retained as a member of the team on the record. For information about configuring a record type to retain the former owner as a member of the team, see Customising Previous Ownership for Shared Records.

To share a record, you first add the person to the Team for the selected record. Then you specify the person's access level to the record.

To share a record

1 Select the record.

   For instructions on selecting records, see Finding Records (on page 68).

2 On the record Detail page, scroll down to the Team section and click Add Users.

3 In the Team Add User window, click the Lookup icon next to User.

4 In the Lookup window, select an employee.

5 Set roles and access levels:

NOTE: Depending on the record type and set-up, your application might differ from these options.

a (Optional) To explain the role the linked record plays in relation to the main record, select an option from the Team Role drop-down list.

b To set the access rights for the record type for team members, select an option from the Access drop-down list. The options that are available by default are as follows:

- **Read-only.** Users can view records but not change them.

- **Edit.** Users can update records.

- **Full.** Users can update or delete records.

Your company administrator can make other access profiles available for teams.

NOTE: Your managers have owner access to the records of their subordinates regardless of the setting of the Manager Visibility Enabled option on the company profile and regardless of your selections in the Access drop-down list. For any user, the most liberal access that is set in the application is the one that determines the access level for that user. For more information about access profiles, see Access Profile Management.

6 Click Save.

7 (Opportunity teams only) To allocate part or all of the revenue on the opportunity to a team member, do the following:

a In the Opportunity Detail page, in the Opportunity Team section, click Edit Users.

b In the Opportunity Team Edit Users page, in the Percentage Split field, enter the percentage of the value that is to be allocated to the team member.

The value in the Percentage Split field can be any number from 0 (zero) to 100.

NOTE: The Split Revenue field is a read-only field that is calculated from the Percentage Split field on the opportunity team record and the Revenue field on the opportunity record.

c Click Save.

Related Topics

See the following topic for related information about opportunity teams:

- About Opportunity Teams (on page 334)

Changing the Primary Custom Book on a Record

Depending on the record ownership mode that your company administrator configures for a record type, a record of that type might have a primary custom book associated with the record instead of having a record owner. You can change the primary custom book on a record. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

To change the primary custom book on a record

1 On the record Detail page, in the Book field, click the Lookup icon.

2 In the Lookup window, find the custom book that you want to associate with the record, and then click Select.

   NOTE: Only books that can contain data can be associated with a record.

   The custom book that was formerly the primary book on the record is removed from the record. If you want the custom book to be associated with the record, then you must add the book to the record in the Book section of the record Detail page.

NOTE: You cannot edit the Primary check box on a custom book record in the Book related information section on a record Detail page.

Updating Groups of Records

Many top-level record types support the mass update feature, which enables you to update the values in fields for a group of records at the same time. For example, you might want to change the ownership of a batch of records to a different employee. You can do this by updating groups of records.

NOTE: Certain record types that are specific to Oracle CRM On Demand Life Sciences Edition do not support the mass update feature, including the Message Response, Messaging Plan, Messaging Plan Item, Messaging Plan Item Relations, Inventory Audit Report, Inventory Period, Sample Disclaimer, Sample Transaction, and Transaction Item record types.

For the record types that support the mass update feature, you can update values in up to 100 selected records at a time. If there are more than 100 records in the list, then you can repeat the task until all of the records are updated. Or, you can further refine your list so that only the records that you want to update are present in the list.

When updating groups of records, the following considerations apply:

■ If you use the mass update feature to change the value in the Sales Stage field on one or more opportunity records, then the value in the Probability percentage field on the records is not updated to the default probability percentage for the new sales stage. If you want the probability percentage on the opportunities to change when the sales stage is updated, then you must change the sales stage on each record individually or by using Web services. For information about Web services, see Web Services Integration.

■ You cannot update individual address fields on records, such as accounts, contacts, leads, and so on, through the mass update feature. However, if your company uses shared addresses, then you can update the fields on top-level address records. For more information on shared addresses, see Addresses and Sharing Addresses Between Account, Contact, Dealer, and Partner Records (on page 358).

NOTE: You can use the mass update feature to update the values in fields in a group of product revenue records linked to an opportunity at the same time. For information about updating the values in a group of opportunity product revenue records, see Linking Products to Opportunities (on page 324).

Before you begin:

■ If necessary, create a list to capture the records that you want to update. For information about creating and using lists, see Working with Lists (on page 112).

■ To update groups of records, your user role must include the Mass Update privilege.

■ For information about the values that are available for selection when you update the Sales Stage field on opportunity records, see About Sales Stages and the Mass Update Feature (on page 334).

The following procedure describes how to update selected records in a list.

To update selected records in a list

1   Open the list of records that you want to update.

   NOTE: When you use the Mass Update functionality, only the records that are displayed in the List page are available for you to update. For example, if you display only 10 records in your List page, then only those 10 records are available for you to update. You can display a maximum of 100 records in the List page.

2   If necessary, sort the list so that the records that you want to update appear at the top of the list.

   TIP: To sort the list by column, click the column heading. To sort the list by the same column but in reverse order, click the column heading again.

3   On the record List page, click Menu, and select Mass Update.

4   In Step 1, clear the check box for records you do not want to update, and then click Next.

5   In Step 2, select the fields that you want to update, and enter new values for those fields.

   You can select up to five fields to be updated to new values. To remove existing values from a field, leave the Value column blank in Step 2.

6   Click Finish.

Merging Records

For certain record types, if you have a duplicate record, you can merge the two records into one record. The merge functionality is supported for the Account, Contact, Division, Household, Lead, Partner, Portfolio, and Service Request record types.

NOTE: For information about what happens when you merge divisions, see About Merging Divisions and Deleting Divisions.

When you merge two records, you specify the field values from the two records that you want to keep in the record that you retain, which is called the *primary record.* The record that is deleted is called the *duplicate record*.

NOTE: If your company uses shared addresses, then you cannot select the individual fields in the billing, shipping, and primary addresses that are to be retained when you merge two accounts or two contacts. By default, the billing, shipping, and primary addresses of the primary record are retained. For more information on these fields, see Account Fields: Import Preparation and Contact Fields: Import Preparation. For more information on shared addresses, see Addresses.

The following considerations apply to the merging of records:

■ If a field has the same value on both the primary record and the duplicate record, you cannot change the value in that field during the merge operation.

■ In fields that are updated by the system, the value defaults to the value from the primary record during the merge operation, and you cannot change the value.

■ With the exception of any custom books that are linked to the duplicate record, all of the records that are linked to the duplicate record are automatically linked to the primary record.

In most cases, Oracle CRM On Demand does not check for duplicate related records. To remove duplicate related records, you must delete them. However, in the case of opportunities that are linked to accounts, Oracle CRM On Demand does not link an opportunity from a merged account to the primary account if the opportunity has the same Opportunity Name and Primary Contact ID as an opportunity that is already linked to the primary account.

NOTE: When you merge two records, any custom books that are linked to the primary record are always retained, but any custom books that are linked to the duplicate record are not automatically linked to the primary record. However, your administrator can enable an option on the company profile to allow you to link the custom books to the primary record automatically when you merge the records. For more information, see About Retaining Linked Custom Books When Merging Records (on page 140).

■ When you merge accounts, the owner of the duplicate account record is added to the account team and given full access to the primary record.

■ If there are more than 9999 records of any one record type linked to either of the records that you want to merge, then the merge operation will not complete successfully. Also, if there are large numbers of records of any type linked to either of the records that you want to merge, then the merge operation might time out, even if the number of linked records of any one record type does not exceed 9999. Other factors can also cause a merge operation to time out, such as the types of records that are involved in the merge operation, the speed of your network, and the load on the Oracle CRM On Demand database and the Oracle CRM On Demand server. You can work around these issues by doing the following:

  ■ Unlink some of the linked records from the parent record as necessary before you merge the parent records.

  ■ Perform merge operations during off-peak hours.

Before you begin:

■ To perform this procedure, your user role must include the Merge Records privilege. To merge records of the Division record type, your user role must also include both the Manage Users privilege and the Manage Roles and Access privilege.

■ Your access level for both the primary record and the duplicate record must allow you to delete the record. If your access level for the primary record does not allow you to delete the record, the Merge button is not available on the record.

■ Note the record names so that you can select them during the merge.

To merge two records

1 Select the record you want to retain as the primary record.

For instructions on selecting records, see Finding Records (on page 68).

2 On the record Detail page, click the Merge button.

3 In Step 1, click the Lookup icon, and select the Duplicate record.

4 In Step 2, review the values for each record, and select the values to be saved with the record.

The Value to Save column displays the values from the primary record by default.

5 In Step 3, if you want the books that are linked to the duplicate record to also be linked to the primary record when the records are merged, then select the check box.

NOTE: Step 3 appears only if the Enable Merge of Duplicate Record's Books check box is selected on the company profile. If Step 3 does not appear, or if you do not select the check box in Step 3, then any books that are linked to the duplicate record are not automatically linked to the primary record when the records are merged. For more information, see About Retaining Linked Custom Books When Merging Records (on page 140).

6 Click Finish.

About Retaining Linked Custom Books When Merging Records

When you merge two records, any custom books that are linked to the primary record are always retained, but any custom books that are linked to the duplicate record are not automatically linked to the primary record. This means that if a user has access to the duplicate record through membership of a custom book that is linked to the duplicate record, and if the user does not have access to the duplicate or primary record through any other access-control component, then that user will not have access to the primary record after the records are merged unless you manually link the appropriate book to the primary record after you merge the records.

However, if your administrator selects the Enable Merge of Duplicate Record's Books check box on the company profile, then when you merge two records, an additional step in the merge operation provides the option to link the duplicate record's custom books to the primary record.

Record Ownership Modes and Merging Records

If you select the option to link the duplicate record's custom books to the primary record when you merge two records, then the record ownership mode that is configured for the record type determines which custom books are linked to the primary record after you merge the records, as described in the following sections.

User Mode

If the record type is configured in User mode, then the following happens after you merge the records:

■ The Book field on the primary record shows the user book for the owner of the primary record.

■ All of the custom books that were linked to the duplicate record are linked to the primary record in the Books related information section on the primary record's Detail page.

■ All of the custom books that were linked to the primary record continue to be linked to the primary record in the Books related information section of the primary record's Detail page.

Book Mode

If the record type is configured in Book mode, then the following happens after you merge the records:

■ The custom book that you select in the Book field in Step 2 of the merge operation becomes the primary book for the primary record. If you select the book from the primary record, then the primary book from the duplicate record is linked to the primary record in the Books related information section of the primary record's Detail page. However, if you select the book from the duplicate record as the primary book, then the book that was the primary book for the primary record is not automatically linked to the primary record.

■ All of the custom books that were linked to the duplicate record are linked to the primary record in the Books related information section of the primary record's Detail page.

■ All of the non-primary custom books that were linked to the primary record continue to be linked to the primary record in the Books related information section of the primary record's Detail page.

Mixed Mode

If the record type is configured in Mixed mode, then the following happens after you merge the records:

■ If the primary record and the duplicate record both have an owner assigned to them, then the behaviour is the same as the   when the record type is configured in User mode.

■ If the primary record and the duplicate record both have a primary custom book assigned to them, then the behaviour is the same as the behaviour when the record type is configured in Book mode.

■ If the primary record has an owner assigned to it, and if the duplicate record has a primary custom book assigned to it, then the following happens after the records are merged:

   ■ The book that you select in the Book field in Step 2 of the merge operation is shown in the Book field of the primary record after the records are merged. If you select the custom book from the duplicate record, then that custom book becomes the primary book for the primary record and the Owner field on the primary record is not populated.

If you select the user book from the primary record, then that user becomes the owner of the primary record and the Book field of the primary record shows the user book for the owner of the primary record. The primary record has no primary custom book assigned to it.

■ All of the custom books that were linked to the duplicate record, including the custom book that was the primary book on the duplicate record, are linked to the primary record in the Books related information section of the primary record's Detail page.

■ All of the custom books that were linked to the primary record continue to be linked to the primary record in the Books related information section of the primary record's Detail page.

■ If the primary record has a primary book assigned to it and the duplicate record has an owner assigned to it, then the following happens:

■ The book that you select in the Book field in Step 2 of the merge operation is shown in the Book field of the primary record after the records are merged. If you select the custom book from the primary record, then that custom book continues to be the primary custom book for the primary record and the Owner field on the primary record is not populated.

If you select the user book from the duplicate record, then that user becomes the owner of the primary record and the Book field on the primary record shows the user book for that user. The primary record has no primary custom book after the records are merged. The custom book that was the primary book for the primary record is not automatically linked to the primary record after the records are merged.

■ All of the custom books that were linked to the duplicate record are linked to the primary record in the Books related information section of the primary record's Detail page.

■ All of the non-primary custom books that were linked to the primary record continue to be linked to the primary record in the Books related information section of the primary record's Detail page.

About the Information in the Links to Custom Books

If a custom book is linked to the primary record as well as the duplicate record before you merge the records, then the information in the link to the book from the primary record is retained after the records are merged, including the setting in the Automatic Association check box. If a custom book is linked to the duplicate record and is not linked to the primary record before you merge the records, then the following happens when the custom book is linked to the primary record after the records are merged:

■ The Automatic Association check box in the link to the primary record is not selected, even if the Automatic Association check box was selected in the link to the duplicate record.

■ The Start Date and End Date fields in the link to the primary record are populated with the information from the corresponding fields in the link to the duplicate record, or are left blank if they were not populated in the link to the duplicate record.

Related Topics

For more information about record ownership modes, see the following topic:

■ About Data Access, Record Sharing, and Record Ownership (on page 47)

Adding Notes

For record types that support the notes feature, you can add a note in two ways:

■ By clicking the note icon at the top-right of the record Detail page. This is available if the Message Centre is enabled for your company. With this method, you can add notes to a list of notes for the record, and subscribe to notes that are added to the record.

■ By clicking New in the Notes section.

Typically, if your company administrator has made the note icon available, the Notes section will not be available. However, if the Notes section is present, notes that you add to the list of notes are also added to the Notes section.

For more information about the Message Centre, see Working with the Message Centre (on page 44). For more information about using the list of notes, see Working with the List of Notes (on page 145).

The method used to create a note makes no difference to the access permissions to the note.

To add a note using the note icon

1 Select the record.

For instructions on selecting records, see Finding Records (on page 68).

2 On the Detail page, click the note icon.

3 Click New Note.

4 On the top line of the note, fill in the Subject.

5 To prevent other users from viewing the note, select the Private check box.

For information about how the Private check box controls access to the note, see Note Edit Page (on page 144).

6 Click Save.

To add a note in the Notes section

1 Select the record.

For instructions on selecting records, see Finding Records (on page 68).

2 On the Detail page, scroll down to the Notes section and click New in the Notes title bar.

3 On the Note Edit page, fill in the Subject.

4 To prevent others from viewing the note, select Private.

For information about how the Private check box controls access to the note, see Note Edit Page (on page 144).

5 Save the record.

Note Edit Page

The Note Edit page allows you to add a note to a record or update information in an existing note. It shows the complete set of fields for a note record. The following table describes the fields on the Note Edit page.

Field	Description
Subject	A required text field where you enter a brief description of the content or purpose of the note.
Private	If you are the creator of the note, then the Private check box works as follows: ■ If you do not select the Private check box, or if you deselect the check box after it was previously selected, then anyone with access to the record can see the note on the record. ■ If you select the Private check box, then the note is not visible by default to other users, even if the note is linked to a record that is visible to others. However, the note might be visible to some users. Users who have the View Private Notes privilege enabled in their user role have visibility to all notes that have the Private check box selected, regardless of the owner of the note. The View Private Notes privilege does not allow a user to update or delete a note that has the Private check box selected and that is owned by another user. Typically, the View Private Notes privilege is given to company administrators only. If you select the Private check box on a note that you did not create, then only the creator of the note and users who have the View Private Notes privilege can see the note after you save your changes. You and other users will not be able to see the note. However, your name appears in the Owner field of the note.
Description	The content of the note. The maximum number of characters allowed is 16,350. **NOTE:** Different restrictions apply when you import notes into Oracle CRM On Demand (see Note Fields: Import Preparation).

Note Page (List)

The Note page shows all notes linked to a record. The following table describes what you can do from the Note page:

To do this	Follow these steps
Create a note	In the Notes title bar, click the New Note button. On the Note Edit page, complete the required information and save the record.

To do this	Follow these steps
Delete a note	Click the Del link in the row of the record you want to delete. You can restore deleted items for up to 30 days after deletion.
Find a note	Click a column header to sort the data for that column. If the Alpha Search controls are available, then you can click the header for the Subject column, and then click a letter in the Alpha bar to find notes where the subject begins with that letter. For notes beginning with numbers, click 0-9. **NOTE:** If your user language is Korean, Japanese, Simplified Chinese, or Traditional Chinese, then the Alpha Search controls are not available.
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select the number of records to be seen at any one time.
Update a note	Click the Edit link in the row of the record you want to update. On the Note Edit page, update the information and save the record. If inline editing is enabled for your company, then you can also edit the fields that are displayed on the Note page inline.
Mark a note as private	Click the Edit link in the row of the record you want to update. On the Note Edit page, select the Private check box. If inline editing is enabled for your company, you can also select the Private check box inline on the Note page. **NOTE:** Some users have access to notes that are owned by other users and that have the Private check box selected. For more information about how the Private check box controls access to the note, see Note Edit Page (on page 144).
View note details	Click the Edit link in the row of the record you want to view. On the Note Edit page, review the note details.

Working with the List of Notes

If this feature is enabled for your company, the record Detail pages contain a note icon at the top right of the page. The number next to the note icon indicates the number of notes attached to the record.

When you click the note icon, a list of notes is displayed. For each note, the name of the user who created the note is displayed, together with the subject of the note or first part of the note text, if there is no subject. The date of the note is displayed, or if the note is from today, the time.

From the list of notes you can do the following:

To do this	Follow these steps
View a note	Scroll down to the required note.

To do this	Follow these steps
Create a new note	Click New Note. Type a subject on the first line, type the note, and click Save. The note is sent to the Message Centre of all users who have subscribed to the record. From the Message Centre, users can click a link on the note to navigate to the record.
Subscribe to notes on the record	Click Subscribe. For more information, see Subscribing to Notes (on page 146).
Delete a note	Scroll down to the required note, and click Delete. This action deletes the note from the Message Centre and the record Detail pages.
View details of the user who sent a note	Scroll down to the required note, and click the user name. The User Details page for the user is displayed.

Subscribing to Notes

You can subscribe to notes that are added to a record so that when someone adds a note to the record, the note is sent to your Message Centre. You can subscribe to notes on any records to which you have access.

From the Message Centre you can click on a link in a note on a record to navigate to the record.

For more information about the Message Centre, see Working with the Message Centre (on page 44).

To subscribe to notes on a record

1 Select the record.

For more information on selecting records, see Finding Records (on page 68).

2 On the Detail page, click the note icon.

3 Click the Subscribe button.

The button label changes to Unsubscribe. You can cancel the subscription by clicking the Unsubscribe button.

Sending Notes to Other Users

You can send a note to other users by clicking a note icon that is displayed next to a user's name in the application. The note is sent to the Message Centre of the user.

You can use this facility with the fields associated with a user name, such as First Name, Owner, Created By, and Modified By. These fields appear in Detail pages, lists, and other places in the application.

From the Message Centre you can reply to notes from other users.

You can add user records to the favourite Records section in the Action bar. This allows quick access to the users that you often send messages to.

For more information about using the Message Centre, see Working with the Message Centre (on page 44).

To send a note to another user

1   Move the pointer over the field associated with the user name so that the note icon appears.

2   Click the note icon

3   Type the note, and click Save.

Working with Attachments

Depending on how your company administrator configures your user role and access profiles, you might be able to attach files (and in some cases, URLs) to various record types. You can find instructions on attaching files in the following topics:

◼ For instructions on attaching files and URLs through the preconfigured Attachments related item, see Attaching Files and URLs to Records (on page 150).

◼ For instructions on attaching files to records that support attachment fields, see Attaching Files to Records through Attachment Fields (on page 154).

For a list of the record types that support the preconfigured Attachment related item, and a list of the record types that support attachment fields, see About Attachments (on page 147).

Related Topics

See the following topics for more information about attachments:

◼ About Attachments (on page 147)

◼ Attachment Related Items (on page 153)

◼ Attachment List Page (on page 153)

About Attachments

Depending on the record type and on how your company administrator has configured Oracle CRM On Demand, you can attach files to some records in the following ways:

◼ Through the Attachments related item on parent records

◼ Through attachment fields

About the Attachments Related Item

On certain record types, your company administrator can add the preconfigured Attachments related item to your record page layout. You can then link multiple attachments to a parent record. An attachment that is linked to a parent record in this way can contain a file or a URL.

The following record types support the preconfigured Attachments related item:

- Account
- Activity
- Campaign
- Contact
- Custom Objects 01, 02, and 03
- Dealer
- Event
- Fund
- Fund Request
- Household
- Lead
- Opportunity
- Partner
- Program Membership
- Service Request
- Solution

Attachments can also be linked to alert records and sales stage records.

For information about attaching files and URLs to records through the preconfigured Attachments related item, see the following topics:

- Attaching Files and URLs to Records (on page 150)
- Attachment Related Items (on page 153)
- Attachment List Page (on page 153)

About Attachment Fields

On the following record types, you can attach a single file to a record through attachment fields. Depending on how your company administrator has configured your page layouts, the attachment fields might be available on the following record types:

- Custom Objects 01, 02, 03, 04, and higher

  NOTE: Your company administrator can also configure Custom Object record types as related items on other record types. If the attachment fields are available on the related Custom Object record type,

you can attach one file to each related record. Such configurations allow you to link multiple files to a parent record. For more information, see About Attachment Configurations.

◼ Inventory Audit Report

◼ Sample Transaction

◼ Signature

The following record types also support attachment fields. However, these record types can be used only as related items, as follows:

◼ Accreditation Attachment

The Accreditation Attachment record type can be made available as a related item on the Accreditation record type only.

◼ Application Attachment

The Application Attachment record type can be made available as a related item on the Application record type only.

◼ Business Plan Attachment

The Business Plan Attachment record type can be made available as a related item on the Business Plan record type only.

◼ Certification Attachment

The Certification Attachment record type can be made available as a related item on the Certification record type only.

◼ Course Attachment

The Course Attachment record type can be made available as a related item on the Course record type only.

◼ Exam Attachment

The Exam Attachment record type can be made available as a related item on the Exam record type only.

◼ MDF Request Attachment

The MDF Request Attachment record type can be made available as a related item on the MDF Request record type only.

◼ Objective Attachment

The Objective Attachment record type can be made available as a related item on the Objective record type only.

◼ Partner Program Attachment

The Partner Program Attachment record type can be made available as a related item on the Partner Program record type only.

◼ Policy Attachment

The Policy Attachment record type can be made available as a related item on the Policy record type only.

- Special Pricing Request Attachment

  The Special Pricing Request Attachment record type can be made available as a related item on the Special Pricing Request record type only.

Some of these record types are industry-specific or specific to Oracle CRM On Demand Partner Relationship Management Edition and might not be available in your edition of Oracle CRM On Demand.

For information about attaching files to records through attachment fields, see Attaching Files to Records through Attachment Fields (on page 154).

Attaching Files and URLs to Records

NOTE: This topic applies only to attachments that are linked to records through the preconfigured Attachments related item. For a list of the record types that support the preconfigured Attachments related item, see About Attachments (on page 147).

On record types that support the preconfigured Attachments related item, you can attach files and URLs to a parent record. After a file or URL is attached to a record, you can:

- View the attachment

- Select a different attachment

- For a file attachment, update the file content and replace the previous attachment with the revised one

When attaching files to records, the following considerations apply:

- You can upload compressed files, including .zip files.

- For data protection and security reasons, Oracle CRM On Demand does not allow you to attach executable files with file extensions such as .exe or .bat.

  NOTE: When a user clicks on an executable file with an extension such as .exe or .bat, the user is given the option of running the file or saving it. To prevent users from inadvertently running an executable file directly from Oracle CRM On Demand in this way, Oracle CRM On Demand does not allow you to attach files with such file extension to records. However, you can work around this by giving the file a different file extension before you upload it. If you give the file a file extension such as .txt, then a user who clicks on the file is not given the option of running the file. The user must save the file to a local machine, change the file extension to the appropriate extension for the executable file, and then run the executable file.

- A file name can contain any character that is supported for use in file names in Microsoft Windows.

- In the case of files that are uploaded as attachments to records through the preconfigured Attachments related information section, you cannot upload two files with the same file name as attachments to the same parent record. However, all photographs that are uploaded from mobile devices that use the iOS operating system are given the same name by the mobile device. To ensure uniqueness of file names within the set of attachments linked to a parent record, Oracle CRM On Demand appends the current timestamp to the file name of all such files. This means that if you upload the same file as an attachment more than once from a mobile device that uses the iOS operating system, then the file is added as an attachment each time that you upload it, but the file names of the attachments in Oracle CRM On Demand are different.

- Each file that you attempt to upload is scanned for viruses. If a virus is found in the file, the file is not uploaded, and a message appears.

■ Uploaded files must be less than 20 MB. If you have a large file, consider the following options:

■ Compress the file to make it smaller.

■ Split the file into smaller files (and compress them if necessary).

■ Place the file on a public server and indicate the path and file name for it instead of attaching the file to the record.

To attach a file or URL to a record

1 Select the record to which you want to attach the file or URL.

For instructions on selecting records, see Finding Records (on page 68).

2 On the Detail page, scroll down to the Attachments section and click Add Attachments or Add URL in the title bar.

NOTE: If you want to send users to a public server to access the file, then click Add URL instead of Add Attachment and follow the procedure for adding a URL attachment, and not a file attachment.

3 On the Attachment Edit page, perform the following:

■ For a file attachment, click the Browse button next to the File field and select the file. After you select the file, the Attachment Name field shows the name of the file without the file extension by default. If you want to use a different name as the display name that identifies the file attachment, then change the value in the Attachment Name field.

NOTE: If you are using a device with a version of the iOS operating system that is supported for use with Oracle CRM On Demand, then the option to take a photograph or video is also available. After you take the photograph or video, it is automatically uploaded to Oracle CRM On Demand as an attachment.

■ For a URL attachment, fill in the URL field with the URL address (for example: www.crmondemand.com) and the Attachment Name field with a display name that identifies the URL. The maximum allowed length of the URL address is 1999 characters.

If the text string that you enter in the URL field starts with http:// or https://, then the text might be automatically converted to a link after the field value is saved. The Convert URL Text Values to Links check box on the company profile determines the behaviour of such text in the URL field, as follows:

■ If the check box on the company profile is selected, then the text is automatically converted to a link after the field value is saved.

■ If the check box is not selected, then the text is not converted to a link.

NOTE: If you have placed a file attachment on a public server, then fill in the URL field with the path and filename using the file: directive as file://///<computer_name>/<directory>/<file_name>, with 5 slashes after file:, for example, file://///scdept/attachments/products.xls. For information on your browser's support for the local file system and the share path URL using the file: protocol, refer to your browser's product documentation.

4 On the Attachment Edit page, click Save.

To view an attachment

1 Select the record to which the file or URL is attached.

For instructions on selecting records, see Finding Records (on page 68).

2 On the Detail page, scroll down to the Attachments section and click View in the appropriate row.

To select a different attachment

1 Select the record to which the file or URL is attached.

For instructions on selecting records, see Finding Records (on page 68).

2 On the Detail page, scroll down to the Attachments section and click the Attachment Name link for the attachment you want to replace.

3 On the Attachment Edit page, perform the following:

- For a file attachment, click the Browse button and select the new file. After you select the new file, the Attachment Name field is automatically updated to show the name of the new file without the file extension. Update the Attachment Name field, if necessary.

- For a URL attachment, fill in the URL field with the new URL address and update the Attachment Name field, if necessary.

4 On the Attachment Edit page, click Save.

TIP: To verify that you have entered the correct attachment information, click the Back link until you return to the original record Detail page. In the Attachments section, review the new attachment record.

To update a file attachment

1 Open the attachment from its original location, but not from within Oracle CRM On Demand.

2 Edit the file and save it locally, for example, to your hard drive.

3 Sign in to Oracle CRM On Demand.

4 Select the record to which you want to attach the updated file.

For instructions on selecting records, see Finding Records (on page 68).

5 On the Detail page, scroll down to the Attachments section and click Replace in the row of the file attachment.

6 In the Replace Attachment window, select the updated file and click Save.

Attachment Related Items

NOTE: This topic applies only to attachments that are linked to records through the preconfigured Attachments related item. For a list of the record types that support the preconfigured Attachments related item, see About Attachments (on page 147).

The following table describes field information for a file or URL that you attach as a related item on a record. Some fields appear on the Detail pages for the record type to which you are attaching the file; other fields appear on the Attachment Edit page.

Review the information in the following table to make sure your file meets the file size and file type requirements.

Field	Description
File	For a file attachment, this field shows the path and filename of the attached file.
Attachment Name	The name you want to use to identify the file or URL. When you upload a file as an attachment, the Attachment Name field shows the name of the file without the file extension by default, but you can change the name.
Size (in Bytes)	For a file attachment, the file size. The file size must be less than 20 megabytes (MB). If the attachment is a URL, the Size field shows a value of 2 kilobytes (KB) by default.
Type	For a file attachment, this field shows the file type, such as .doc for a Microsoft Word document. For your data protection and security, the application does not allow you to attach files with the .exe file extension. For a URL attachment, it displays URL.
URL	For a URL attachment, this field contains the complete URL address. The maximum allowed length of the URL address is 1999 characters.
Created By	The alias of the person who first attaches the file to the record. The value in this field is system-generated.
Modified By	The name of the person who updates the record followed by the date and time it is updated. The value in this field is system-generated.

Attachment List Page

NOTE: This topic applies only to attachments that are linked to records through the preconfigured Attachments related item. For a list of the record types that support the preconfigured Attachments related item, see About Attachments (on page 147).

The Attachment List page shows all files and URLs linked to a record. You access the Attachment List page by clicking the Show Full List link in the Attachments section of the main record.

The following table describes the tasks you can perform from the Attachment List page.

To do this	Follow these steps

To do this	Follow these steps
Attach a file to the record	In the Attachments title bar, click the Add Attachment button. On the Attachment Edit page, complete the required information and save the record.
Attach a URL to the record	In the Attachments title bar, click the Add URL button. On the Attachment Edit page, complete the required information and save the record.
Delete an attachment	Click the Del link in the row of the record you want to delete. You can restore deleted items for up to 30 days after deletion.
Find an attachment	Click the Attachment Name column header to sort the data. Then click a letter in the alphabet bar. For attachment names beginning with numbers, click 0-9.
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Select a different attachment to replace the current one	Click the Replace link in the row of the record you want to change. On the Attachment Edit page, select another file and save the record.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select the number of records to be seen at any one time.
Sort the list of attachments	Click the underlined column header you want to sort on. If the column header is not underlined, you cannot sort on that field.
View the attachment	Click the View link in the row of the record you want to view. This opens the file or takes you to the URL.

Attaching Files to Records through Attachment Fields

Attachment fields are supported on Custom Object record types and on certain record types that are industry-specific or specific to Oracle CRM On Demand Partner Relationship Management Edition. The attachment fields allow you to attach a single file to a record. For a list of the record types where attachment fields are supported, see About Attachments (on page 147).

Your company administrator determines if the attachment fields are available on the page layouts for your user role.

When attaching files to records, the following considerations apply:

■ You can upload compressed files, including .zip files.

■ For data protection and security reasons, Oracle CRM On Demand does not allow you to attach executable files with file extensions such as .exe or .bat.

NOTE: When a user clicks on an executable file with an extension such as .exe or .bat, the user is given the option of running the file or saving it. To prevent users from inadvertently running an

executable file directly from Oracle CRM On Demand in this way, Oracle CRM On Demand does not allow you to attach files with such file extension to records. However, you can work around this by giving the file a different file extension before you upload it. If you give the file a file extension such as .txt, then a user who clicks on the file is not given the option of running the file. The user must save the file to a local machine, change the file extension to the appropriate extension for the executable file, and then run the executable file.

■ A file name can contain any character that is supported for use in file names in Microsoft Windows.

■ In the case of files that are uploaded as attachments to records through the preconfigured Attachments related information section, you cannot upload two files with the same file name as attachments to the same parent record. However, all photographs that are uploaded from mobile devices that use the iOS operating system are given the same name by the mobile device. To ensure uniqueness of file names within the set of attachments linked to a parent record, Oracle CRM On Demand appends the current timestamp to the file name of all such files. This means that if you upload the same file as an attachment more than once from a mobile device that uses the iOS operating system, then the file is added as an attachment each time that you upload it, but the file names of the attachments in Oracle CRM On Demand are different.

■ Each file that you attempt to upload is scanned for viruses. If a virus is found in the file, the file is not uploaded, and a message appears.

■ Uploaded files must be less than 20 MB. If you have a large file, consider the following options:

    ■ Compress the file to make it smaller.

    ■ Split the file into smaller files (and compress them if necessary).

    ■ Place the file on a public server and indicate the path and file name for it instead of attaching the file to the record.

The following procedure describes how to attach a file to a record through attachment fields.

To attach a file to a record through attachment fields

1 On the Edit page of the record to which you want to attach the file, in the Attachment field, click the paper clip icon:

2 Browse to the file you want to attach and select it.

NOTE: If you are using a device with a version of the iOS operating system that is supported for use with Oracle CRM On Demand, then the option to take a photograph or video is also available. After you take the photograph or video, it is automatically uploaded to Oracle CRM On Demand as an attachment.

3 Save your changes.

NOTE: Depending on how your company administrator configures the page layout, you might see the Attachment: File Name field and the Attachment: Size (In Bytes) field on the page. If these fields are present, they are automatically populated with the file name and file size when you save the record. You cannot edit these fields.

You can remove an attached file from a record. However, when you remove the file, it is deleted from the Oracle CRM On Demand database, and you cannot restore it from within Oracle CRM On Demand.

TIP: Before you remove the file from the record, download the file to your local machine or another server and save it.

The following describes how to remove a file from a record.

To remove a file from a record

1 On the record Edit page, click the X icon next to the Attachment field.

2 Confirm that you want to remove the file from the record.

Using Assessment Scripts

If your company administrator sets up assessment scripts, you can access the scripts to collect information about your customer or sales opportunity. The information can then be mapped to the parent record and used in reports and analyses later.

The application allows you to access scripts from the following record types:

■ Account (Account Surveys)

■ Activity (Activity Assessments on a Sales Call, Task, or Appointment)

■ Business Plan (Business Plan Assessments)

■ Contact (Customer Satisfaction Surveys)

■ Lead (Lead Qualification Scripts)

■ Objective (Objective Assessments)

■ Opportunity (Opportunity Assessments)

■ Service Request (Call Scripts and Customer Satisfaction Surveys)

Your company administrator can set up filters to help you to identify the appropriate assessment for a task. For example, a lead qualification assessment script might be set up with the following filters:

■ Account Tier = Gold

■ Segment = Large

■ Region = West

Then, when you launch an assessment script from a lead record with the corresponding filter field values, the correct lead qualification script is listed. After an assessment is completed, data that the company administrator changes subsequently in the template script is not reflected in the completed assessment record. The answer section is the only exception to this rule.   The company administrator can change data in the answer section at any time, and changes are reflected in the assessment detail page when you work through the template questions.

Before you begin. To use assessment scripts, your user role must be set up to allow access to the assessment records. For more information about the required settings, see About Assessment Scripts.

To use an assessment script

1 Select the record.

For instructions on selecting records, see Finding Records (on page 68).

2 On the record Detail page, scroll down to the script section and click Add.

3 If necessary, select the script from the Lookup window.

If only one script meets the criteria defined by your company administrator, the script opens automatically. Otherwise, you need to select the appropriate script in the Lookup window.

TIP: To find the appropriate script, select an option from the drop-down list and click Go.

4 On the script page, ask your customer the questions and complete the required information.

5 Click Save.

Depending on how your company administrator set up this script, the following events might occur:

- A score is calculated and compared to a threshold.

- Depending on whether the score is above or below the threshold, an outcome is calculated.

- The score, the answers to the questions and the outcome are mapped back to the parent record.

- The last assessment date is also populated.

About Deleting and Restoring Records

When you delete a record or a list of records, the records are stored for 30 days in the Deleted Items area. During that time, you can restore the records. However, after 30 days, the deleted items are permanently purged and cannot be retrieved.

NOTE: For a list of the record types that are stored in the Deleted Items area, see Oracle Web Services On Demand Guide, which is available from the Oracle CRM On Demand documentation library (see Oracle CRM On Demand documentation library - http://www.oracle.com/technetwork/documentation/siebelcrmod-096050.html) on Oracle Technology Network.

Types of Delete Operations

When you delete a record, the delete operations that are performed on the record and its related records are determined by the record types and the relationships between the records. The types of delete operations are as follows:

- **Direct delete.** When you delete a record, the record itself is deleted. This operation is called a *direct delete.*

■ **Cascade delete.** When you delete a record, any of the record's child records that are not of a top-level record type, such as notes and attachments, are also deleted. This operation is called a *cascade delete.*

The following exceptions apply:

■ A cascade delete is not performed on audit trail records when their parent record is deleted.

■ A cascade delete is not performed on a child address record if it is a shared address.

■ **Deep delete.** In some cases, when you delete a record, some of the record's child records that are of a top-level record type are also deleted. This operation is called a *deep delete.*

When a deep delete is performed on a child record, the following happens:

■ A cascade delete is performed on any of the record's child records that are not of a top-level record type, with the exception of audit trail records and any child address records that are shared addresses.

■ A deep delete is performed on some of the record's child records that are of a top-level record type, depending on the record types involved.

The following table shows the record types on which a deep delete is performed when a parent record is deleted. Apart from the record types listed in this table, all other child records that are of a top-level record type are untouched when their parent record is deleted.

Parent Record Type	Record Types on Which a Deep Delete Is Performed
Account	■ Asset ■ Lead ■ Opportunity ■ Vehicle
Contact	Lead
Dealer	Vehicle
Opportunity	Lead
Partner	■ Lead ■ Opportunity

For example, assume that you have an account that has child note records, a child custom object 04 record, and a child opportunity record. The child opportunity record has child note records, a child custom object 05 record, and a child lead record. If you delete the account record, then the following happens:

■ A direct delete is performed on the account record.

■ A cascade delete is performed on the account's child note records.

■ The account's child custom object 04 record is untouched because the Custom Object 04 record type is a top-level record type and is not listed in the table of record types on which a   deep delete is performed.

■ A deep delete is performed on the account's child opportunity record.

When a deep delete is performed on the account's child opportunity, the opportunity's child records are treated as follows:

■ A cascade delete is performed on the opportunity's child note records.

■ The opportunity's child custom object 05 record is untouched because the Custom Object 05 record type is a top-level record type and is not listed in the table of record types on which a deep delete is performed.

■ A deep delete is performed on the opportunity's child lead record.

About Deleting Record Associations

When you delete a child record that is linked to another (parent) record, Oracle CRM On Demand does not delete the information that associates the records with each other. The association information is retained so that if a deleted record is later restored, the associations between the restored record and any records with which it was previously linked can also be restored. However, because the association information for the deleted child record is retained in the parent record, Web service calls that query the parent record will return the association information.

Therefore, if you want to delete a record, and if you also want to delete the information that associates that record with another record, then it is recommended that you first delete the association between the records by unlinking the records. For example, if you have an account record that is linked to a custom object 01 record, and if you want to delete the account and the association between the account and the custom object 01 record, then unlink the account record from the custom object 01 record before you delete the account. However, if you later restore the account record, then the relationship between the account record and the custom object 01 record is not restored.

Additional Information About Deleting Records

The following table provides additional information about deleting records.

If you delete this	You should be aware of this
Account	You cannot delete an account if it is linked to an Opportunity with a Sales Stage of Closed-Won.
Activity	If you want to delete a communication activity, then the Manage Company privilege and the Batch Delete and Restore privilege must be enabled for your role. **NOTE:** Users who have the Delete Any Activity privilege in their role can delete activities that they do not own or activities that are marked private. Typically, the Delete Any Activity privilege is given to company administrators only.
Address	If you restore a deleted address, you must update the Billing and Shipping settings because when Oracle CRM On Demand restores the address record, it does not restore the address settings to the original values. You must readjust these values to avoid the creation of erroneous data. For more information about deleting shared addresses, see Deleting Shared Addresses (on page 363).

If you delete this	You should be aware of this
Division	For information about what happens when divisions are deleted, see About Merging Divisions and Deleting Divisions.
Group	When you delete a group, the system removes the reference to the group from the group's records, and the record ownership reverts to the employee in the Owner field. If this process involves a large number of records, it might take some time to complete. During this time, the system does not allow group members to create records.
Opportunity	You cannot delete an opportunity where the Sales Stage field is set to Closed because that information is used for historical reporting.
Product	You cannot delete a product. To remove a product from the list of available products that can be linked to opportunities or linked to accounts as assets, company administrators can deselect the Orderable check box on the Product Edit page.
Product Category	A user whose role includes the Manage Content privilege can delete product categories. When a category is deleted, the association between the product and the category is broken, but the products are retained.
Role	A user whose role includes the Manage Roles and Access privilege can delete roles. Instead of being stored for 30 days, deleted roles are immediately purged from the system and cannot be restored. Before deleting a role, all users assigned to this role must be assigned to a different role. Otherwise, the application does not let you delete the role.
Solution	When you delete a solution, the solution history records are also deleted. If you believe a solution is no longer useful, but it was at one time linked to a service request, then change the status of the solution to Obsolete instead of deleting the solution. This means that your company can prevent the solution from being further used by your customer service representatives, but it is saved for historical purposes. To determine if the solution has been used, go to the Solution Detail page, and check the Service Requests section for linked records.
Territory	A user whose role includes the Manage Territories privilege can delete territories. Territories can be deleted regardless of whether or not they are associated with other territories, accounts, opportunities and so on. The Territory Detail page shows the company administrator whether or not the territory has any children. The company administrator can search for accounts, opportunities, and so on, using the Territory field in the search criteria to find out if the territory that is to be deleted is associated with any records.

NOTE: For further information on linked records, see Converting Leads to Accounts, Contacts, Deal Registrations, or Opportunities (on page 250).

Deleted Items

When you click the Deleted Items global link, the All Deleted Items page appears with all the items you have deleted. If your user role includes the Recover All Records privilege, you will see all deleted items for your company.

The parent record appears in the deleted items list, however the linked records do not. The only time a linked record appears as a separate record is when you delete the linked record *before* deleting the parent record.

For example, if you delete an account with three notes linked to it, then the note records do not appear in the list of deleted items. However, if you had deleted one of those linked notes before deleting the account itself, then that note appears in the list of deleted items as a separate record.

When you restore a record, all records linked to that record at the time it was deleted are also restored with their relationships intact. Always restore the parent record first; if you try to restore a child record first, the system displays an error message.

You can use the list on the All Deleted Items page to help you to find deleted records. When you select a record type from the list, the records that are displayed include all deleted notes and attachments for records of that type, as well as all deleted records of that type. However, the rule for linked records still applies. Notes and attachments that were deleted with the parent record are not shown in the list. For example, if you select All Accounts in the list, all account notes and account attachments that were deleted separately from their parent record are displayed, as well as all deleted account records.

NOTE: Companies are limited to the amount of data they can store. Records stored in Deleted Items do not count towards a company's total disk storage limit.

About Row IDs for Deleted Items

When you delete a record, the deleted item is given a row ID that is different from the row ID of the original record. However, when you restore the record, the original row ID of the record is restored. If you select the option to export all fields when you export a list of deleted items, then the data that is exported for each deleted item includes both the row ID that was assigned to the deleted item, and the original row ID of the record. For more information about exporting lists of records, see Exporting Records in Lists (on page 131).

Related Topic

See the following topic for instructions on deleting and restoring records:

■ Deleting and Restoring Records (on page 161)

Deleting and Restoring Records

You can delete a record if your access level to that record allows it. Depending on the privileges that are enabled for your user role, you might also be able to perform some or all of the following tasks:

■ Delete a list of records.

- Restore individual records that other users deleted.

- Restore a list of records that you deleted.

- Restore a list of records that another user deleted.

CAUTION: When you delete a record, some or all of the records linked to the record that you delete might also be deleted.

Before you begin. It is recommended that you read the About Deleting and Restoring Records (on page 157) topic, which provides information about the linked records that are deleted when a parent record is deleted as well as other information about deleting and restoring records.

Deleting Individual Records

The following procedure describes how to delete a record from a record Detail page.

To delete a record from a record Detail page

- On the record Detail page, click Delete.

  NOTE: If you access the record Detail page by drilling down from a List page or from a list of related records on a parent record, then after you delete the record, Oracle CRM On Demand returns to the page from which you drilled down.

The following procedure describes how to delete a record in a list of records.

To delete a record in a list of records

- In the row for the record that you want to delete, choose Delete from the record-level menu.

Deleting Lists of Records

Many top-level record types support the batch delete feature, which enables you to delete multiple records at the same time from a List page. The following procedure describes how to delete a list of records.

NOTE: Certain record types that are specific to Oracle CRM On Demand Life Sciences Edition do not support the batch delete feature, including the Message Response, Messaging Plan, Messaging Plan Item, Messaging Plan Item Relations, Inventory Audit Report, Inventory Period, Sample Disclaimer, Sample Transaction, and Transaction Item record types.

Before you begin. To perform this procedure, your user role must include the Batch Delete and Restore privilege.

To delete a list of records

1 Open the list of records that you want to delete.

  TIP: Export the list before you delete it. Exporting the list allows you to import the data in to Oracle CRM On Demand if you delete some records in error.

2 On the record List page, click the Menu button and select Batch Delete.

3 Click OK to confirm that you want to proceed.

The Batch Delete and Restore Queue page opens. Your request appears in the Active Requests section of the page. When the request is successfully prepared, Oracle CRM On Demand sends you an email, and the Proceed option becomes available in the record-level menu for the request on the Batch Delete and Restore Queue page. In the meantime, you can optionally navigate away from the Batch Delete and Restore Queue page and then return to it later to finish deleting the list of records. You can return to the Batch Delete and Restore Queue page at any time by clicking the Admin global link and then clicking the Batch Delete and Restore Queue link on the Admin Homepage.

4 In the Active Requests section of the Batch Delete and Restore Queue page, in the record-level menu for the request that you submitted, click Proceed.

NOTE: If you do not click Proceed, then the records are not deleted.

5 Click OK to confirm that you want to proceed.

When the operation completes, Oracle CRM On Demand sends you an email.

6 To review the log file for the operation, in the entry for the request in the Processed Requests section of the Batch Delete and Restore Queue page, click View Delete Log.

Restoring Individual Records

You can restore any record that you deleted. If your role includes the Recover All Records privilege, then you can also see the records that other users deleted in the Deleted Items area, and you can restore them. The following procedure describes how to restore an individual record.

To restore an individual record

1 Click the Deleted Items global link.

2 Click Restore in the row for the record.

NOTE: When you delete a record, the record is stored for 30 days in the Deleted Items area. During that time, you can restore the record. However, after 30 days, the deleted record is permanently purged and you cannot retrieve the record. For more information about the Deleted Items area, see About Deleting and Restoring Records (on page 157).

Restoring Deleted Lists of Records

If you deleted a list of records, then you can restore all of the records in that list at the same time. If your user role includes the Recover All Records privilege, then you can also restore the lists of records that other users deleted. The following procedure describes how to restore a deleted list of records.

Before you begin. To perform this procedure, your user role must include the Batch Delete and Restore privilege.

To restore a deleted list of records

1 Click the Deleted Items global link.

2 On the All Deleted Items page, click the Menu button, and then select Batch Restore.

3 On the Batch Delete and Restore page, in the Processed Requests section, find the batch delete request for the list that you want to restore.

NOTE: When you delete a list of records, the records are stored for 30 days in the Deleted Items area. During that time, you can restore the records. However, after 30 days, the deleted records are permanently purged and you cannot retrieve the records. For more information about the Deleted Items area, see About Deleting and Restoring Records (on page 157).

4 In the record-level menu for the request, select Restore.

The batch delete request is moved from the Processed Request section to the Active Requests section. When the request is successfully prepared, Oracle CRM On Demand sends you an email, and the Proceed option becomes available in the record-level menu for the request on the Batch Delete and Restore Queue page. In the meantime, you can optionally navigate away from the Batch Delete and Restore Queue page and then return to it later to finish restoring the list of records. You can return to the Batch Delete and Restore Queue page at any time by clicking the Admin global link and then clicking the Batch Delete and Restore Queue link on the Admin Homepage.

5 In the Active Requests section of the Batch Delete and Restore Queue page, in the record-level menu for the request that you submitted, click Proceed.

NOTE: If you do not click Proceed, then the records are not restored.

6 Click OK to confirm that you want to proceed.

When the operation completes, Oracle CRM On Demand sends you an email.

7 To review the log file for the operation, in the entry for the request in the Processed Requests section of the Batch Delete and Restore Queue page, click View Restore Log.

Viewing Audit Trails for Records

On record types that support audit trails, you can view the audit trail that tracks the changes made to the audited fields on a record.

Depending on how your company administrator configures the audit trail for the record type, the audit trail can also show the following:

■ An entry for the creation of the record

■ If the record has been deleted or restored, an entry for each of these actions

NOTE: If a record has been deleted but has not been restored, the record itself is no longer accessible, so you cannot view the details of the delete action in the related audit trail information. However, there is an entry for the delete action in the company-wide Master Audit Trail. If the record is later restored, there is an entry for the delete action and an entry for the restore action in the company-wide Master Audit Trail and in the audit trail information on the record. To view the

company-wide Master Audit Trail, you must have the Access Master Audit Trail and Admin Configuration Audit privilege in your user role.

For changes to records, the audit trail shows the old and new values in a field, as well as the timestamp and the name of the user who made the change to the field. Your company administrator determines which fields, if any, are audited. For information about the record types that support audit trails, and a list of the fields that are audited by default, see Customising the Audit Trail.

Before you begin. To enable you to view the audit trail for a record type, your company administrator must make sure that the page layouts for your role are configured to include the Audit Trail related item on the Detail page layout for the parent record type. Your company administrator must also give you read-only access to the Audit Trail related item on the parent record type. If the Audit Trail related item is still not visible on your record Detail page after the company administrator has completed the configuration, click the Edit Layout link on the record Detail page, and add the Audit Trail as a related information section. For more information on editing your Detail page layouts, see Changing Your Detail Page Layout (on page 855).

NOTE: The Invitee record type is a child record type of the Event record type. To enable you to view the audit trail for invitee records, your administrator must configure the Invitee page layout to include the Audit Trail related information section through the Application Customisation pages for the Event record type. To allow you to view the audit trail for invitee records, your administrator must give you read-only access to the Invitee Audit Trail related item for the Event parent record type.

To view the audit trail for a record

◼ On the record Detail page, scroll down to the Audit Trail related information section.

Each row shows the date on which the record was updated and who made the update. The new and old values in the changed audited field are also shown.

NOTE: Each audit trail record of a change shows the details of one change to only one field. The audit trail records of changes are shown only for the audited fields. So, if a user saves a record after changing two fields, but only one of those fields is audited, then an audit trail record is shown for the change to the audited field only. The details of the change to the other field are not shown.

About Duplicates When Creating Records

For many record types, when you create a record, Oracle CRM On Demand warns you if that record already exists. The existing record can reside in your current company records. If you receive the duplicate error message, cancel creating the record, find the existing record and update it.

For the following record types, Oracle CRM On Demand does not check for duplicate records when you create a new record through the user interface:

◼ Activity

◼ Account Revenue

◼ Assessment

◼ Contact

◼ Contact Revenue

◼ Custom Object 01, 02, 03, 04 and higher

- Deal Registration Product Revenue

- Household

- Lead

- Note

- Opportunity Product Revenue

- Order

- Order Item

- Sample Disclaimer

    NOTE: Only one sample disclaimer where the disclaimer type is set to Global can be active at any time, and only one sample disclaimer where the disclaimer type is set to Multilingual can be active for any country at any time.

- Sample Request

- Sample Request Item

- Special Pricing Product

- Special Pricing Request

NOTE: Before adding a new record, search the records list to make sure that the record does not already exist.

The following table lists the fields that are used to determine if a record is a duplicate when the record is created through the user interface.

NOTE: For information on what constitutes record duplication when records are imported, see About Record Duplicates and External IDs.

Records of This Type	Are Duplicates If All of These Fields Match
Account	Account Name and Location
Account Competitor	Competitor Name
Account Partner	Partner Name
Address	Address Name
Appointment Contact	Contact Name
Appointment User	User Name
Attachments	File Name
Business Plan	Plan Name, Type, Status, and Period
Campaign	Source Code
Campaign Recipient	Contact
Division	Division Name

Records of This Type	Are Duplicates If All of These Fields Match
Event	End Date and Name
Objective	Objective Name, Type, Status, and Period
Opportunity	Opportunity Name, Account, and Primary Contact ID **NOTE:** The Primary Contact ID is the ID of the contact that you select in the Primary Contact Last Name field.
Opportunity Competitor	Competitor Name
Opportunity Partner	Partner Name
Plan Account	Account and Business Plan Name
Plan Contact	Contact and Business Plan Name
Plan Opportunity	Business Plan and Opportunity
Product	Product Name
Product Category	Category Name
Service Request	Service Number **NOTE:** The Service Number is automatically generated by Oracle CRM On Demand.
Social Media	Unique ID **NOTE**: Oracle CRM On Demand automatically sets the Unique ID field to the Row ID of the record.
Social Profile	Author, Community, and Contact
Solution	Title
Task Contact	Contact Name
Task User	User Name
Team	User Name
User	User ID and Company Sign In ID
Partner Relationship Management	
Accreditation	Accreditation Name
Accreditation Request	Accreditation Name, Partner Name, and Request Date
Application	Application ID **NOTE:** The Application ID is automatically generated by Oracle CRM On Demand.
Certification	Certification Name

Records of This Type	Are Duplicates If All of These Fields Match
Certification Request	Certification Name, Contact Name, and Request Date
Course	Course Name
Course Enrolment	Course Name, Candidate Name, and Enrolment Date
Deal Registration	Name and Principal Partner
Exam	Exam Name
Exam Registration	Exam Name, Candidate Name, Owner, and Exam Date
Fund	Fund ID **NOTE**: Oracle CRM On Demand automatically sets the Fund ID field to the Row ID of the record.
Fund Request	Request Name and Request Date
MDF Request	Request Name and Request Date
Partner	Partner Name and Location
Partner Program	Partner Program Name
Price List	Price List Name and Type
Price List Line Item	Price List, Product, and Type
Life Sciences	
Allocation	Allocation Type, Sample, and Owner
Blocked Product	Product, Contact
Contact Best Time	Day, Start Time, End Time, Address, and Contact Full Name
Contact State Licence	Licence Number and Contact Full Name
HCP Contact Allocation	Contact Name, Product Name, Allocation Type, and Start Date
Inventory Audit Report	Type, Status, Reason, Completed Date, Inventory Period, and Owner User Sign In ID
Inventory Period	Start Date, Active, Reconciled, and Owner
Message Response	Response, End Time, Start Time, Sequence Number, Follow-up, and Solution ID
Messaging Plan	Name, Disclosure Mandatory, Lock Sequence, Enable Follow-up, Status, Type, Product Name, and Owner
Messaging Plan Item	Disclosure Message, Sequence Number, Type, Parent Messaging Plan, and Solution Name

Records of This Type	Are Duplicates If All of These Fields Match
Messaging Plan Item Relations	Type, Parent MP Item, and Solution Name
Product Detailed	Product name and Indication picklist, or Product name with Product-Indication selection
Product Indication	Indication Name and Product Name
Promotional Item Dropped	Product
Related Disclaimer	Language and Sample Disclaimer Row ID **NOTE:** The Sample Disclaimer Row ID is taken from the parent sample disclaimer.
Sample Dropped	Product, with either no sample lots or with the same sample lot **NOTE:** Products with different sample lot numbers are considered unique.
Sample Inventory	Inventory Period and Sample
Sample Lot	Lot # and Sample
Sample Transaction	Name, Date, and Type
Signature	Signature Control and Activity
Transaction Item	Line Number, Transaction #, and Sample
Wealth Management	
Financial Account	Financial Account
Financial Account Holder	Business Account, Financial Account Holder Name, Financial Account, and Role
Financial Account Holding	Financial Account, Financial Product, and Financial Account Holdings Name
Financial Plan	Financial Account, Financial Plan Name, and Type
Financial Product	Financial Product Name
Financial Transaction	Financial Account, Financial Product, and Transaction ID
Portfolio	Account Number and Product
Insurance	
Broker Profile	Partner, Broker Profile Year, and Broker Profile Name.
Claim	Claim Number and Policy
Coverage	Coverage Name, Coverage, and Policy
Damage	Claim Number, Insurance Property, and Damage Name

Records of This Type	Are Duplicates If All of These Fields Match
Insurance Property	Type, Policy, and Sequence Number
Involved Party	Claim Number, Contact, and Role
Policy	Policy Number
Policy Holder	Policy, Role
Automotive	
Dealer	Name
Financial Information	Finance Detail # NOTE: The Finance Detail # is automatically generated by Oracle CRM On Demand.
Make	Make
Sales History	Sales Number NOTE: The Sales History # is automatically generated by Oracle CRM On Demand.
Sales Hours	Day and Open Time
Service History	SH # NOTE: The Service History # is automatically generated by Oracle CRM On Demand.
Service Hours	Day and Open Time
Territory	Name
Vehicle	VIN
Vehicle Contact	User Name

Printing Information That Appears on Pages

From all pages except the Edit pages, you can print the information that shows on that page. All extraneous interface elements and links are excluded when you print a page. When printing the information that appears on a page, note the following points:

- If the related information sections on a record Detail page are shown as tabs, then only the related information section that is currently open is shown on the printed Detail page. The open related information section appears on the printed page in list mode, without the tab image.

■ When you print a record List page, only the records that are displayed on the page are shown on the printed List page, even if there are more records in the list. The maximum number of records that you can display in a List page is 100. For more information about displaying records in list pages, see Working with Lists (on page 112).

To print the information appearing on your page

1 Click the Printer Friendly link.

A separate page opens, showing the printer-friendly page.

2 In the page, click the Print link.

3 In the Print window, adjust the preferences for your printer to ensure that it prints the page in landscape mode.

Using Landscape mode optimises the appearance of the data on the printed page.

4 Follow the onscreen instructions to print the page.

Viewing Oracle CRM On Demand Service Information

The Service Information page provides information about planned and recent maintenance sessions for your Oracle CRM On Demand production environment and staging environment. The *production environment* is the environment where your company performs its work in Oracle CRM On Demand. The *staging environment* is typically a copy of the production environment that can be used for testing purposes, for example, to test configuration changes before applying them to the production environment, or to test patches before they are applied to the production environment.

The Service Information page also provides information about the availability of your Oracle CRM On Demand production environment over the last number of months.

The following procedure describes how to view Oracle CRM On Demand service information.

To view Oracle CRM On Demand service information

■ Scroll to the bottom of any page in Oracle CRM On Demand, and click Service Information to open the Service Information page.

In the Service Information page, the Version Information section shows details of the version level, patches, and so on, which apply to the Oracle CRM On Demand environment where you are currently signed in. This information is used by Oracle for troubleshooting purposes. You might be asked to provide this information if you contact Oracle for assistance.

The following table describes the information shown in the Production Availability Information section of the page.

Field	Description
Month	The calendar month for which the availability information is provided.
Availability(%)	The percentage of time during the specified month that the Oracle CRM On Demand production environment was available. **NOTE:** Availability information is provided approximately mid-month for the previous calendar month. On rare occasions, the availability information can be changed after it is first provided.

In the Service Information page, the maintenance schedule information for the production environment and the staging environment are shown in two separate sections.

The following table describes some of the information shown in the maintenance schedule sections of the page.

Field	Description
Maintenance Date	The date for the maintenance session. Dates in the future indicate planned maintenance sessions, and they are subject to change.
Estimated Start Time	The estimated time that the session will start. The time shown is the time in your local time zone.
Estimated Duration (hrs)	An estimate of the length of time the session will take, shown in hours.
Maintenance Type	The type of maintenance that was or will be performed, for example, standard maintenance or a patch installation. **NOTE:** If the date for the maintenance session is in the future, the maintenance type information is subject to change.
Last Updated	The date that the information for the maintenance session was last updated.

NOTE: From the Service Information page, a Diagnostics link provides access to diagnostics information. For security reasons, the information is encrypted. If you contact Oracle for assistance, you might be asked to click the Diagnostics link and to send the encrypted information to Oracle CRM On Demand Customer Care.

Retrieving Your User Sign-In ID or Resetting Your Password

If you forget your user sign-in ID, you can submit a request from the Oracle CRM On Demand sign-in page to have the information sent to you in email. If you forget your password, you can submit a request to reset your password, also from the Oracle CRM On Demand sign-in page, provided that your user role has the Reset Personal Password privilege.

If you forget both your user sign-in ID and password, you can retrieve your user sign-in ID and then use that information, together with the security questions that you set up in Oracle CRM On Demand, to reset your password.

When retrieving your user sign-in ID or resetting your password, note the following points:

■ To retrieve your user sign-in ID, you must know the primary email address that is stored on your user record in Oracle CRM On Demand. If you have problems retrieving your user sign-in ID, contact your company administrator to verify the primary email address.

■ To reset your password, you must know your user sign-in ID. Therefore, if you forget both your password and your user sign-in ID, retrieve your user sign-in ID first, and then use that information to reset your password.

■ To reset your password, you must know the answers to the security questions that you set up in Oracle CRM On Demand.

■ Each time your user sign-in ID is sent to you, an entry is created in the audit trail on your user record.

■ Each time you reset your password, an entry is created in the audit trail on your user record.

To retrieve your user sign-in ID

1 On the Oracle CRM On Demand sign-in page, click the Can't Access Your Account? link.

2 On the Select an Option page, click the I Forgot My User Sign In ID link.

3 Enter the primary email address that is stored on your user record in Oracle CRM On Demand, and then click Go.

Depending on the email address you enter, the following happens:

■ If the email address you enter is syntactically correct, a confirmation message appears, otherwise, an error message appears.

■ If the email address you enter is the correct primary address on your user record, an email containing your user sign-in ID is sent to the email address.

■ If the email address you enter is syntactically correct, but is not the correct primary address on your user account, no email is sent to you. In that case, contact your company administrator to verify the correct primary email address.

NOTE: If you have more than one account in Oracle CRM On Demand, the active user sign-in ID for each account is included in the email, unless the account is configured for Single Sign-On only. If you do not know whether your account is configured for Single Sign-On only, contact your company administrator to find out.

When you receive the email containing your user sign-in ID, if you know your password, you can return to the sign-in page and sign in to Oracle CRM On Demand as usual.

NOTE: You can submit up to three requests to have your user sign-in ID sent to you in any 24 hour period.

If you forget your password, you can reset it as described in the following procedure.

To reset your password

1 On the Oracle CRM On Demand sign-in page, click the Can't Access Your Account? link.

2 On the Select an Option page, click the I Forgot My Password link.

3 On the Forgot Your Password page, enter your user sign-in ID, and then click Go.

If you enter the correct user sign-in ID, a confirmation message appears and you receive an email containing a temporary link to Oracle CRM On Demand.

4 To access Oracle CRM On Demand, click the temporary link in the email.

NOTE: Your company administrator determines how long the temporary link remains valid, as well as the number of times you can attempt to sign in using the temporary link.

5 On the Reset Password page, enter the answers to your security questions and click Submit.

6 On the Password Update page, in the New Password field, enter a new password, then enter the same new password again in the Verify New Password field.

7 Click Save to save your new password.

NOTE: Your company administrator determines how many times you can reset your password in a given period of time.

About Oracle CRM On Demand Session Duration

Your company administrator can specify the maximum duration for an Oracle CRM On Demand active session for your company. If your interactive user session reaches the specified maximum duration, then the next time that you perform an action in Oracle CRM On Demand, such as clicking a link, tab, or button, you are returned to the sign-in page, and you must sign in again to return to the page that you were trying to access. When using Web services, if the active session times out, then the Web services client must send a new authentication request to continue using Web services.

The Company Idle Timeout setting on the company profile determines the time allowed in minutes before a user session ends because of inactivity. Your administrator can also optionally configure a warning window to appear a certain amount of time before a session ends because of inactivity. Clicking OK on the warning window sets the idle timeout counter. If you do not click OK before the idle timeout limit is reached, then your session ends.

About Concurrent Sessions in Oracle CRM On Demand

Your company administrator can specify whether concurrent sessions are allowed. *Concurrent sessions* occur when the same user credentials are used to sign in to Oracle CRM On Demand more than once, from different browsers, at the same time. Only interactive user sessions are counted. Connections to Oracle CRM On Demand through Web services or desktop clients are not considered when concurrent sessions are counted.

Your company administrator specifies whether concurrent sessions are allowed. The following table shows the behaviour that users see when an attempt is made to sign in to Oracle CRM On Demand with user credentials that are already in use for at least one existing session, depending on the option your company administrator chooses.

Option	Behaviour
Allow with Notification	The new session is allowed. When the user signs in to the new session, the following happens: ■ In the new session, a message appears on the Oracle CRM On Demand page to indicate that at least one other concurrent session exists. The message contains a link that the user can click to view the sign-in history for the user. ■ In each existing concurrent session, the next time the user performs an action in Oracle CRM On Demand, such as clicking a link, tab, or button, a message appears on the Oracle CRM On Demand page to indicate that a concurrent session has started. The message contains a link that the user can click to view the sign-in history for the user.
Allow without Notification	The new session is allowed. No notification is given in the new session or in any existing session to indicate that a concurrent session is in progress.
Prevent and Terminate Existing	The new session is allowed, but the existing session is terminated. When the user signs in to the new session, the following happens: ■ In the new session, a message appears on the Oracle CRM On Demand page to indicate that another session with the same credentials will be terminated. The message contains a link that the user can click to view the sign-in history for the user. ■ In the original session, the next time that the user performs an action in Oracle CRM On Demand, such as clicking a link, tab, or button, the user is returned to the sign-in page, where a message indicates that the session was terminated because another user signed in with the same credentials.

System Requirements for Oracle CRM On Demand

You can find details of the system requirements for Oracle CRM On Demand on the Oracle CRM On Demand Web site http://crmondemand.oracle.com/en/products/system-requirements/index.html.

Release Notes for Oracle CRM On Demand

A set of release notes is provided with each release of Oracle CRM On Demand. The release notes outline minor changes to Oracle CRM On Demand, which change the existing behaviour or the user interface. The release notes are provided on the Training and Support Centre Web site, which you can access by clicking the Training and Support global link at the top of each page in Oracle CRM On Demand.

Contacting Oracle

Oracle offers a variety of services and welcomes your suggestions about this application. Use the following resources to:

- Suggest improvements to the product, our services, or our processes at https://ebusiness.siebel.com/OnDemandCustomerCare/

- Request sales collateral or information about our new products and promotions at http://www.crmondemand.com/

- Suggest improvements to online help by sending email to siebeldoc_ww@oracle.com

Exiting Oracle CRM On Demand

CAUTION: Before exiting Oracle CRM On Demand, explicitly save all information, and close all the open windows, such as forms for creating new records. If you are using Oracle Contact On Demand, the call centre application, change your work status to Unavailable before signing out.

To exit Oracle CRM On Demand

- In the top-right corner of your Oracle CRM On Demand page, click Sign Out.

When signing out of Oracle CRM On Demand, consider the following:

- It is recommended that you always use the Sign Out link to exit Oracle CRM On Demand so that your session will be terminated. If you close the browser window to exit Oracle CRM On Demand instead of clicking the Sign Out link, then your session remains open until it times out after a specified idle timeout interval. The idle timeout interval is a company-wide setting and is usually configured for 60 minutes.

- It is recommended that you close all of your open browser windows and tabs after you sign out of Oracle CRM On Demand, to help to protect your company's information.

2   Calendar and Activities

Use the Calendar pages to review, create, and update your activities and to review and update your planned calls.

An *activity* consists of tasks that you need to accomplish before a certain date and appointments that you want to schedule for a specific time. Tasks and appointments can be meetings, calls, demonstrations or events. The difference between tasks and appointments is that tasks appear in a task list and have a due date and status, whereas appointments are scheduled on your calendar with a specific date and time.

A *planned call* is a Life Sciences specific call that you create with a status of Planned in order to tentatively have a place holder for a sales call to a physician, hospital, or clinic. Planned calls appear on the calendar and in the Planned Calls section on the Calendar pages.

The colour coding that is used in the Planned Calls section on the Calendar pages is determined by the theme that you use, as follows:

- Overdue planned calls with a start date that is in the past appear in the colour that your administrator selects for the alert text in the theme.

- Upcoming planned calls with a start date that is in the future appear in the colour that your administrator selects for the page links in the theme.

Planned calls are not visible by default on your calendar. To see planned calls on your calendar, your user role must include the Life Sciences privilege Calls: Calendar Planned Calls.

About Calendars and Theme Styles

Two theme styles are available in Oracle CRM On Demand: the classic style and the modern style. The theme style determines the appearance of the Calendar pages. For example, the icons for the daily, weekly, and monthly view are different in the classic and modern theme styles. The following table describes some of the other differences in the Calendar pages in the theme styles.

NOTE: The instructions provided in the online help typically reflect the themes that have the classic style.

Calendar Feature	Classic Style	Modern Style
Layout of the daily calendar view	- Half-hour time slots are not indicated. - The start and end dates and times are not shown for	- Half-hour time slots are indicated by thin lines. - Appointments that span multiple days are shown at the top of the daily calendar view.

Calendar Feature	Classic Style	Modern Style
	appointments that span multiple days.	The start and end dates and times of the appointments are shown. If there are more than five appointments that span multiple days, then you can scroll to see the additional appointments. ■ If there are appointments in time slots outside of the time slots that are shown for the day, then up and down arrows are shown as necessary. You can click the arrows to see more appointments.
Layout of the weekly calendar view	■ The days of the week are shown on the left of the calendar view. ■ The hours of the day are not shown. ■ The appointments for a day are listed in the row for that day. ■ For appointments that span multiple days, the start and end times are shown. The start and end dates are not shown.	■ The days of the week are shown at the top of the calendar view. ■ The hours of the day are shown on the left of the calendar view. ■ The details of an appointment are shown in the time slot or slots in which the appointment occurs. If some of the details are not visible, then you can rest your pointer on the entry to see the details. ■ Appointments that span multiple days are shown at the top of the weekly calendar view. The start and end dates and times of the appointments are indicated. If there are more than five appointments that span multiple days, then you can scroll to see the additional appointments. ■ If there are appointments in time slots outside of the time slots that are shown for the days of the week, then up and down arrows are shown as necessary. You can click the arrows to see more appointments.
Layout of the monthly calendar view	For appointments that span multiple days, the start time is shown in the cell for the start date.	Appointments that span multiple days are shown across the slots for the relevant days in the monthly calendar view. The start and end times are shown. However, if the start date is in a previous month, then the start date and a left arrow are shown instead of the start time. If the end date is in a future month, then the end date and a right arrow are shown instead of the end time.

Calendar Feature	Classic Style	Modern Style
Background colour for time slots	The background colours in some calendar views reflect the work day and business hours settings for the calendar, which can be specified at company level and at user level. For more information, see About Calendar Work Days and Business Hours (on page 182).	The background colours in some calendar views reflect the work day and business hours settings for the calendar, which can be specified at company level and at user level. For more information, see About Calendar Work Days and Business Hours (on page 182).
Colour coding by appointment type	All appointments have the same background colour, regardless of the appointment type. In addition, the text in all appointments is displayed in the same font colour for all types of appointments. However, the text in overdue planned calls in the Planned Calls section of the Calendar pages is shown in a different font colour. For information about the colour coding that is used for planned calls, see Calendar and Activities (on page 177).	Depending on how your administrator sets up the theme that you use, the background and text colours for some or all of the appointments in your calendar views might be determined by the appointment type. If your administrator sets up colour coding for any of the appointment types for your theme, then a key to the colour coding appears at the bottom of your calendar views showing the background colours that are assigned to those appointment types. If an appointment type does not have any custom colours assigned to it, then appointments of that type are shown in the default colours for your theme. The colour coding is used in the daily, weekly, and monthly calendar views. **NOTE:** The colour coding that is used for the text in the Planned Calls section of the Calendar pages is not determined by the colour coding for appointment types. For information about the colour coding that is used for planned calls, see Calendar and Activities (on page 177).

Calendar Feature	Classic Style	Modern Style
Access to other calendar views	■ In the User tab, you can access the calendars of other users in your group and users who share their calendar with you. ■ In the Group tab, you can view a combined calendar for the members of your group, as well as any custom group calendar views that you set up. ■ In the Group Tasks tab, you can view a list of the tasks assigned to your group. ■ The My Calendar button returns you to your own calendar from the calendar of another user.	A menu provides the following options: ■ Group Calendar. View a combined calendar for the members of your group, as well as any custom group calendar views that you set up. ■ Group Tasks. View a list of the tasks assigned to your group. ■ User Calendar. View the calendars of other users in your group and users who share their calendar with you. ■ My Calendar. Return to your own calendar from the calendar of another user. Your current view determines which options are available in the menu.

Calendar Feature	Classic Style	Modern Style

Creating new appointments	To open the Appointment Edit page, where you can enter the details of the new appointment, do one of the following:
	
	■ Click New Appointment.
	
	■ In the weekly or monthly view of your own or another user's calendar, click the plus icon (+) for the day on which you want to create the appointment.
		To open the Appointment Edit page, where you can enter the details of the new appointment, do one of the following:
		
		■ In your own calendar, or another user's calendar, or a group calendar, click New.
		
		■ In the daily or weekly view of your own or another user's calendar:
		
		  ■ Double-click the time slot. By default, the new appointment starts at the start time of the time slot you clicked, and the duration is 60 minutes. You can change the details.
		
		  ■ Double-click the space at the top of the calendar view, where the appointments that span multiple days are shown. (If you are in the weekly calendar view, double-click directly below the day that you want the appointment to start.) By default, the new appointment starts at 12 P.M. on the day that you clicked, and the duration is 1440 minutes (24 hours). You can change the details.
		
		■ In the monthly view of your own or another user's calendar, double-click the space for the day. By default, the new appointment starts at 12 P.M. on that day, and the duration is 60 minutes. You can change the details.

Editing appointments	In the daily, weekly, or monthly calendar view, do one of the following: ■ To open the Appointment Edit page, click the Edit link in the appointment. ■ To open the Appointment Detail page, click the subject link in the appointment.	In the daily, weekly, or monthly calendar view, do one of the following: ■ To open the Appointment Edit page, double-click the appointment, or right-click the appointment, and then select Edit. ■ To open the Appointment Detail page, click the subject link in the appointment.
Saving appointments as iCalendar files	In the daily, weekly, or monthly calendar view, click the Save as iCalendar link in the appointment.	In the daily, weekly, or monthly calendar view, right-click the appointment, and then select Save as iCalendar.

Calendar Feature	Classic Style	Modern Style
Deleting appointments	In the daily, weekly, or monthly calendar view, click the subject link in the appointment to open the Appointment Detail page, and then click Delete.	In the daily, weekly, or monthly calendar view, do one of the following: ■ Right-click the appointment and then select Delete. ■ Click the subject link in the appointment to open the Appointment Detail page, and then click Delete.

TIP: In themes that have the modern style, overlapping appointments are shown side-by-side in the daily and weekly calendar views. If there are multiple appointments in a time slot, then some of the appointments might not be shown. If there are more appointments in a time slot than can be shown in the weekly calendar view, then you can change to the daily calendar view to see additional appointments. If there are more appointments in a time slot than can be shown in the daily calendar view, then you can view the appointments in a list. For information about viewing lists of appointments, see Working with Activity Lists (on page 192).

About Calendar Work Days and Business Hours

The default work days and business hours for your company are specified on the company profile. If you want your calendar to show different work days and business hours, then you can select the work days and specify the business hours that you want in your default calendar settings. For more information, see Setting Your Default Calendar View (on page 217).

In the weekly calendar view, you can switch between viewing the full calendar week and viewing only the days that are specified as work days. If you use a classic theme, then you can use the Show Full Week and Show Work Week links to switch between the views. If you use a modern theme, then you can use the Full Week and Work Week menu options to switch between the views.

The settings for work days and business hours, as well as the theme that you use, determine the background colours for time slots in some of the calendar views, as follows:

■ For modern themes, in the daily and weekly calendar views of your own calendar and the calendars of other users who share their calendar with you, three different background colours are used, with one colour for each of the following:

  ■ The business hours on work days.

  ■ The non-working hours, including all of the hours on days that are not work days, as well as the hours outside of business hours on work days.

  ■ The business hours on the current day.

■ For classic themes:

  ■ In the daily calendar view of your own calendar and the calendars of other users who share their calendar with you, two different background colours are used, with one colour for each of the following:

    ■ The business hours on work days.

    ■ The non-working hours, including all of the hours on days that are not work days, as well as the hours outside of business hours on work days.

- In the weekly calendar view of your own calendar and the calendars of other users who share their calendar with you, three different colours are used, with one colour for each of the following:

    - The work days.

    - The days that are not work days.

    - The current day.

NOTE: The work days and business hours are the same in your views of your own calendar and your views of the calendars of other users who share their calendar with you, even if those users specify different work days and business hours for their own calendar views. So, if you select work days that are different from the company-wide settings, then the work days that you select are reflected in your views of your own calendar and your views of the calendars of other users. Similarly, if you specify business hours that are different from the company-wide business hours for your calendar, then your specified business hours are reflected in your views of both your own calendar and the calendars of other users.

The settings for work days and business hours are not reflected in the background colours for time slots and days in the following calendar views:

- The monthly calendar views of your own calendar and the calendars of other users who share their calendar with you. In the monthly calendar views, only the current day is shown with a background colour that is different from the other days in the month.

- The daily, weekly, and monthly group calendar views.

Working with the Calendar Pages

The Calendar pages provide the main area for managing activities. The default page is the Daily Calendar page, which contains a Daily Calendar section, a Calendar View section, an Open Tasks section and a Planned Calls section.

To see the Planned Calls section on the Calendar page, your user role must include the Calls: Calendar Planned Calls privilege. The Planned Calls section lists up to two weeks of planned calls for the sales representative in chronological order and displays the following information for each planned call: call date and start time, time of day, subject, contact to be visited and other contact address information. The two week range for the listed planned calls includes the planned calls for the previous week and the planned calls for the upcoming week.

The colour coding that is used in the Planned Calls section on the Calendar pages is determined by the theme that you use, as follows:

- Overdue planned calls with a start date that is in the past appear in the colour that your administrator selects for the alert text in the theme.

- Upcoming planned calls with a start date that is in the future appear in the colour that your administrator selects for the page links in the theme.

For more information about creating a planned call, see Tracking Visits (Sales Calls) to Customers (on page 198), Dropping Samples During a Sales Call (on page 630), and Mass Call Planning (on page 204).

You can select the calendar view that you want to display each time that you click the Calendar tab, and you can specify which day is shown as the first day of the week in your calendar. Also, you can specify a set of work days and business hours that are different from the default work days and business hours for your company. You can also choose to display additional information in the appointments in your calendar views.

For information about setting up these calendar options, see Setting Your Default Calendar View (on page 217).

NOTE: If your role includes the Share Calendar privilege, your Calendar pages might provide additional functionality than that listed on the default page. For more information on additional functionality, see Calendar Settings Page (on page 216).

The following table describes what tasks you can perform from the Daily or Weekly Calendar.

NOTE: Communication activities generated from Oracle Contact On Demand belong to a specific activity subtype. Therefore, they do not appear on the Calendar pages or Activity lists.

To do this	Follow these steps
Create a task	Click New in the Open Tasks title bar. On the Task Edit page, enter the task information and save the record.
Delete a task	Click the link for the task that you want to delete. On the Task Detail page, click Delete.
Create an appointment	Click New Appointment in the Calendar title bar. On the Appointment Edit page, enter the appointment information and save the record.
Delete an appointment	Click the link for the appointment that you want to delete. On the Appointment Detail page, click Delete.
Go to a specific day	Click the day link in the Calendar View section. Alternatively, you can click the 1 icon above the appointments and then use the arrows in the heading of the Daily Calendar section to scroll to the day that you want to view.
Go to a specific month	Click the arrows in the Calendar View section. Alternatively, you can click the 31 icon above the appointments and then use the links or arrows in the heading of the monthly calendar view to go to the month that you want to view.
Mark a task as completed	In the Open Tasks section, click the Show Full List link. On the Activities List page, click the Subject link for the task you want to mark as completed. On the Task Detail page, click Mark as Completed.
Page through the Calendar day by day	Click the arrows in the Daily Calendar section.
Reschedule an appointment by dragging and dropping it	Drag the appointment and drop it in a different time slot or day. For more information, see About Dragging and Dropping Appointments in the Calendar (on page 191).
Update an activity	Click the link for the activity (appointment, task or planned call) that you want to update. On the Appointment Detail, Task Detail or Call Detail page, edit the fields inline or click Edit to open the Appointment, Task or Call Edit page. For more information on updating records, see Updating Record Details (on page 103). **TIP:** If you use a modern theme, then you can right-click an appointment in the daily, weekly, or monthly calendar view and then click Edit to update the appointment.

To do this	Follow these steps
View a list of appointments, tasks (open, closed, or all), activities or planned calls	In the Open Tasks section, click the Show Full List link. On the Activities List page, click the drop-down list and change the selection.
View the day's appointments	Click the 1 icon in the Calendar.
View the details of an activity	Click the link for the activity (appointment, task, or planned call) that you want to view.
View the entire month's appointments	Click the 31 icon in the Calendar.
View the entire week's appointments	Click the 7 icon in the Calendar.

Related Topics

See the following topics for related information:

- About Calendars and Theme Styles (on page 177)
- About Calendar Work Days and Business Hours (on page 182)

Managing Calendars and Activities

For step-by-step procedures for managing calendars and activities, see the following:

- Viewing Activities (on page 186)
- Creating Activities (on page 189)
- Updating Activities (on page 190)
- Removing Users From Activities (on page 190)
- Limiting Activity Records Displayed (on page 197)
- Marking Tasks as Completed (on page 197)
- Assigning Activities to Another Employee (on page 198)
- Tracking Visits (Sales Calls) to Customers (on page 198)
- About Event and Appointment Synchronisation (on page 220)

  NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- Adjusting Message Responses (on page 208)

- ■ Scheduling Appointments with Others (on page 210)

- ■ Saving Appointments as iCalendar Files (on page 212)

- ■ Mass Call Planning (on page 204)

- ■ Using Activity Assessment Scripts (on page 220)

- ■ Setting Your Default Calendar View (on page 217)

- ■ Reviewing Recommended Messaging Plans for Activities (on page 698)

- ■ Creating Appointments for Multiple Accounts (on page 285)

If your user role includes the Share Calendar privilege, you can also perform the following procedures:

- ■ Viewing the Calendars of Other Users (on page 214)

- ■ Sharing Your Calendar (on page 216)

- ■ Adding Custom Calendar Views (on page 219)

If your user role includes the Share Calendar privilege and your company uses the default group assignment option, you can also perform this procedure, Viewing Group Task Lists (on page 219).

If your user role includes the Maps Integration privilege, then you can also perform this procedure, Performing Proximity Searches (on page 378).

For step-by-step procedures that are common to many record types, see:

- ■ Creating Records (on page 51)

- ■ Updating Record Details (on page 103)

- ■ Linking Records to Your Selected Record (on page 104)

- ■ Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about calendars and activities:

- ■ About Calendars and Theme Styles (on page 177)

- ■ About Calendar Work Days and Business Hours (on page 182)

- ■ About Activity Reminders (on page 189)

Viewing Activities

Oracle CRM On Demand keeps your activities in the forefront by showing them on several pages:

■ My Homepage

My Homepage contains separate lists for your appointments and tasks, sorted by date.

■ Calendar

The Calendar pages show your appointments as they would appear in an appointment book, opened on today's schedule. You can review other days by using the monthly calendars on the right or by clicking the 1, 7, and 31 icons above the appointments to see the desired calendar view.

The Daily and Weekly Calendar pages also show a list of up to ten of your tasks for the next 30 days (Due Date <= Today +30), sorted by the due date by default.

■ Detail page for record types, such as Accounts, Contacts and so on.

The Detail pages can contain related information sections that show the activities that are linked to a specific record. The following table describes the related information sections that you might see for activities in a record Detail page. In all cases, you see only the records to which you have visibility.

List	Records Displayed
Activities	■ The linked tasks on which the completed date is blank. ■ The linked appointments on which the completed date and time are later than the current date and time. ■ The linked tasks on which the completed date and time are earlier than the current date and time. ■ The linked appointments on which the completed date and time are earlier than the current date and time.
Completed Activities	■ The linked appointments on which the completed date and time are earlier than the current date and time. ■ The linked tasks on which the completed date and time are earlier than the current date and time.
Open Appointments	The linked appointments where the value in the Completed Date field is not in the past. **NOTE:** If the Completed Date field is not populated by the user who creates the appointment, then it is automatically populated with the same value as the End Time field of the appointment. When an appointment's completed date is reached, the appointment is removed from the Open Appointments list and becomes part of the Completed Activities list. The information in the Open Appointments and Completed Activities related information sections of the parent record's Detail page is updated when the page is refreshed. The records in the Open Appointments list are sorted by the date and time in the Start Time field, with the appointment that has the earliest start date and time appearing first in the list.
Open Tasks	The linked tasks that do not have a value in the Completed Date field or a status of Completed, provided that your company uses

List	Records Displayed
	the default set of values for the Status field.
	NOTE: When a task is marked as completed, the Completed Date field is automatically populated with the date and time in the time zone of the user who marks the task as completed. Users can also populate the Completed Date field on a task manually. When the Completed Date field on a task is populated, the task is removed from the Open Tasks list and is included in the Completed Activities list.
	The information in the Open Tasks and Completed Activities related information sections of the parent record's Detail page is updated when the page is refreshed.
	The records in the Open Tasks list are sorted by the Due Date field, with the task that has the earliest due date appearing first in the list.
Open Activities	A combination of the Open Appointments and Open Tasks lists.
	NOTE: The records in the Open Activities list are sorted by the Completed Date field. Records on which the Completed Date field is blank appear at the bottom of the Open Activities list. Therefore, open tasks appear at the bottom of the Open Activities list, after all open appointments. If you do not want the related open tasks and open appointments on a record Detail page to appear in this order, then it is recommended that your company administrator adds the Open Tasks and Open Appointments related information sections to your record Detail page instead of the Open Activities related information section.

NOTE: You can also synchronise your activity records with Oracle Offline On Demand (the Offline client). For more information, see Working with Other Applications (on page 877).

About Managing Tasks

One way of managing tasks is to prioritise them by importance or urgency. You prioritise a task by assigning it a level, such as 1-High, 2-Medium, or 3-Low. The task priority is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority. You can change the priority level of a task on the Task Edit page. The default priority for a task is 3-Low.

TIP: Tasks appearing in red in the Open Tasks section of My Homepage, the Daily Calendar page, and the Weekly Calendar page are past their due date. Tasks that are past their due date do not appear in red in other pages such as the list page that opens when you click Show Full List in the Open Tasks section of My Homepage.

NOTE: If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand

displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values.

For information about the Group Task List tab, available for companies that use the Group feature, see Viewing Group Task Lists (on page 219).

Creating Activities

You always create an activity (task or appointment) by entering information in a form. You can access this form from different areas within the application, depending on what you are working on and what you need to do.

This section describes one method for creating an activity, which allows you to add the record while continuing with your work in the main area of the application. For a description of all the methods, see Creating Records (on page 51).

To create an activity using the Create section of the Action bar

1 In the Create section of the Action bar, click Appointment or Task.

2 In the form, enter the activity information.

For information about the fields in activity records, see Activity Fields (on page 222).

3 Save the record.

Related Topics

See the following topics for related information:

■ Activity Fields (on page 222)

■ Working with the Calendar Pages (on page 183)

■ About Activity Reminders (on page 189)

■ Using the Offline Client (on page 878)

■ Adding Emails from Microsoft Outlook and Lotus Notes (on page 885)

About Activity Reminders

If a reminder is configured for an activity, then at the time specified for the reminder, an email is sent to the activity owner and to each user in the list of users on the activity, if the Activity Notification field setting on

the user's record and at company level allows activity reminders to be sent to the user. For information about the Activity Notification field, see Setting Your Default Calendar View (on page 217).

Email reminders are sent in the user's language. The subject of the activity is displayed in the subject line of the email. In an email reminder for an appointment, the message includes information from the Subject, Start Time, Status, and Description fields on the appointment. It also includes the names of the contacts who are linked to the appointment, the name of the account that is linked to the appointment, if one exists, and a link to the Detail page of the appointment in Oracle CRM On Demand.

In an email reminder for a task, the message includes information from the Subject, Due Date, Priority, Status, and Description fields on the task. The email message also includes a link to the Detail page of the task in Oracle CRM On Demand.

Updating Activities

You can update the information in the activity record, including changing the record status to completed, if you have edit access to the record.

NOTE: Users who have the View Private Activities privilege and the Can Read All Records setting for the Activity record type enabled in their user role have visibility to all activities that are marked private, regardless of the owner of the activity. The View Private Activities privilege does not allow a user to update or delete an activity that is marked private and is owned by another user. Users who have the Delete Any Activity privilege and the Can Read All Records setting for the Activity record type enabled in their role can delete activities that they do not own or activities that are marked private. Typically, the Delete Any Activity and View Private Activities privileges are given to company administrators only.

To update activity information

1   Select the task or appointment.

   For instructions on selecting activities, see Finding Records (on page 68).

2   On the Appointment or Task Detail page, edit the fields inline or click Edit to open the Appointment or Task Edit page. For more information on updating records, see Updating Record Details (on page 103).

Removing Users From Activities

To remove users from an activity, at least one of the following conditions must be true:

■   You are the owner of the activity.

■   Your name appears in the Delegated By field on the activity.

Otherwise, the Remove links are not available in the Users section of the Appointment Detail page or the Task Detail page and you cannot remove users from the activity. You can manually update the Delegated By field on the activity so that it shows your name. Then, after you refresh the activity Detail page, a Remove link is available for each of the users except the owner of the activity. For more information about the Delegated By field, see Activity Fields (on page 222).

To remove a user from an activity

1   In the Appointment Detail page or the Task Detail page, scroll to the Users section.

2   If the user that you want to remove does not appear in the list, then click Show Full List to expand the list.

3   Find the user that you want to remove, then click the Remove link for the user, and then confirm that you want to remove the user.

NOTE: The Remove links are also available in the multiassociation window that opens when you click Add in the Users section of the page, if you are the owner of the activity or your name appears in the Delegated By field on the activity.

About Dragging and Dropping Appointments in the Calendar

If you have the necessary access levels to allow you to edit an appointment, then you can reschedule the appointment by dragging it and dropping it within a calendar view. For example, when you are working in the daily calendar view, you can drag an appointment to a different time slot within the same day. When you are working in the weekly calendar view, you can drag an appointment to a different day of the week that you are currently viewing.

The behaviour for appointments that do not span multiple days is as follows:

■   **Daily calendar view.** You can drag an appointment and drop it in a different time slot within the same day. When you drop the appointment in the new time slot, the start time for the appointment is updated to the start time of the new slot. For example, if you drag an appointment that was due to start at 9:15 A.M. to the time slot that starts at 10:30 A.M., then the start time of the appointment is updated to 10:30 A.M. The end time of the appointment is automatically updated to the appropriate value, depending on the start time of the slot in which you drop the appointment and the duration of the appointment. For example, if you drag an appointment of 60 minutes duration and drop it in the time slot that starts at 10:30 A.M., then the end time of the appointment is updated to 11:30 A.M. The duration of an appointment remains the same after you move it. If you want to change the duration of an appointment, then you must edit the appointment.

The new time slot must allow the appointment to start and end within the same day. For example, you cannot drag an appointment of 60 minutes duration and drop it in the time slot that starts at 11:30 P.M., because the end time for the appointment would not be within the same day as the start time.

NOTE: If you use a classic theme, then a red line appears when you drag an appointment in the daily view. The red line indicates whether the time slot starts on the hour or the half-hour.

■   **Weekly calendar view.** You can drag an appointment and drop it in a different day within the same week. The duration of the appointment does not change. If you use a classic theme, then you cannot change the time of day of the appointment by dragging and dropping the appointment within the weekly calendar view. The date of the appointment is updated when you drop the appointment in a different day, but the time of the appointment does not change.

However, if you use a modern theme, then you can change the time of an appointment by dragging it and dropping it in a specific time slot in a day in the weekly calendar view. The start time and date, and the end time and date of the appointment are updated accordingly. The new time of day must allow the appointment to start and end within the same day. If there are more appointments within a

time slot than can be shown in the weekly calendar view, then you might not see the appointment after you move it. You can change to the daily calendar view to see more appointments.

■ **Monthly calendar view.** You can drag an appointment and drop it in a different day within the same month. The time of day and the duration of the appointment do not change. If you want to change the time or duration, then you must edit the appointment. If there are more appointments within a day than can be shown in the monthly calendar view, then you might not see the appointment after you move it. You can change to the daily or weekly calendar view to see more appointments.

The behaviour for appointments that span multiple days is as follows:

■ **Daily calendar view.** You cannot drag an appointment that spans multiple days to a different day or time when using the daily calendar view.

■ **Weekly calendar view.** Within the section that shows the appointments that span multiple days, you can drag an appointment and drop it in a different day within the week that is currently displayed, even if the appointment ends in a different week. The day in which you drop the appointment is the new start day for the appointment.   For example, if you drag an appointment that starts at 10:30 A.M. on Monday March 21 and ends at 10:30 P.M. on Wednesday March 23 and drop it in Tuesday March 22, then the appointment details change so that the appointment starts at 10:30 A.M. on March 22 and ends at 10:30 P.M. on March 24. If you want to change the time of day that the appointment starts or the duration of the appointment, then you must edit the appointment.

■ **Monthly calendar view.** You can drag an appointment that spans multiple days and drop it in a different day within the month that is currently displayed, even if the appointment ends in a different month. The day in which you drop the appointment is the new start day for the appointment.   For example, if you drag an appointment that starts at 10:30 A.M. on March 24 and ends at 10:30 P.M. on March 29 and drop it in March 31, then the appointment details change so that the appointment starts at 10:30 A.M. on March 31 and ends at 10:30 P.M. on April 05. If you want to change the time of day that the appointment starts or the duration of the appointment, then you must edit the appointment.

Working with Activity Lists

You can open the Activity List page from a record Detail page or from a Calendar page. The list of records that is shown when you open the Activity List page depends on how you access the page.

What Is Shown When You Open the Activity List Page from a Record Detail Page

When you open the Activity List page by clicking the Show Full List link in a list of activity records on a record Detail page, the Activity List page shows the activities that are linked to the record. The list can include open activities, completed activities, or a combination of both, as shown in the following table. In all cases, you see only the records to which you have visibility.

List	Records Displayed

List	Records Displayed
Activities	■ The linked tasks on which the completed date is blank. ■ The linked appointments on which the completed date and time are later than the current date and time. ■ The linked tasks on which the completed date and time are earlier than the current date and time. ■ The linked appointments on which the completed date and time are earlier than the current date and time.
Completed Activities	■ The linked appointments on which the completed date and time are earlier than the current date and time. ■ The linked tasks on which the completed date and time are earlier than the current date and time.
Open Appointments	The linked appointments where the value in the Completed Date field is not in the past. **NOTE:** If the Completed Date field is not populated by the user who creates the appointment, then it is automatically populated with the same value as the End Time field of the appointment. When an appointment's completed date is reached, the appointment is removed from the Open Appointments list and becomes part of the Completed Activities list. The information in the Open Appointments and Completed Activities related information sections of the parent record's Detail page is updated when the page is refreshed. The records in the Open Appointments list are sorted by the date and time in the Start Time field, with the appointment that has the earliest start date and time appearing first in the list.
Open Tasks	The linked tasks that do not have a value in the Completed Date field or a status of Completed, provided that your company uses the default set of values for the Status field. **NOTE:** When a task is marked as completed, the Completed Date field is automatically populated with the date and time in the time zone of the user who marks the task as completed. Users can also populate the Completed Date field on a task manually. When the Completed Date field on a task is populated, the task is removed from the Open Tasks list and is included in the Completed Activities list. The information in the Open Tasks and Completed Activities related information sections of the parent record's Detail page is updated when the page is refreshed. The records in the Open Tasks list are sorted by the Due Date field, with the task that has the earliest due date appearing first in the list.

List	Records Displayed
Open Activities	A combination of the Open Appointments and Open Tasks lists.
	NOTE: The records in the Open Activities list are sorted by the Completed Date field. Records on which the Completed Date field is blank appear at the bottom of the Open Activities list. Therefore, open tasks appear at the bottom of the Open Activities list, after all open appointments. If you do not want the related open tasks and open appointments on a record Detail page to appear in this order, then it is recommended that your company administrator adds the Open Tasks and Open Appointments related information sections to your record Detail page instead of the Open Activities related information section.

What Is Shown When You Open the Activity List Page from a Calendar Page

When you open the Activity List page by clicking a Show Full List link on a Calendar page, the list shows all open activities that are assigned to you. Other lists are also available to you in the Activity Lists page. The set of lists that is available to you can include both the standard lists that are distributed with Oracle CRM On Demand and custom lists for your company. Your visibility to records is determined as follows:

- For all lists except the lists of delegated activities, your visibility to records is limited to those activities where your name appears in the Owner field or in the list of users, unless you have the View Private Activities privilege or the Delete Any Activity privilege in your role.

- For lists of delegated activities, your visibility to records is limited to those activities where your name appears in the Delegated By field.

- For all lists, the filter that is applied to the list determines which records are displayed in the list.

NOTE: If your company administrator added you to a group, then a Group Tasks tab appears on your calendar pages.

About Access to Private Activities in the Activity List Page

If you have the View Private Activities privilege and the Can Read All Records setting for the Activity record type enabled in your user role, then you have visibility to all activities that are marked private, regardless of the owner of the activity. The View Private Activities privilege does not allow you to update or delete an activity that is marked private and is owned by another user.

If you have the Delete Any Activity privilege and the Can Read All Records setting for the Activity record type enabled in your user role, then you can delete activities that you do not own or activities that are marked private. Typically, the Delete Any Activity and View Private Activities privileges are given to company administrators only.

What You Can Do From the Activity List Page

The following table describes what you can do from the Activity List page.

NOTE: If you access the Activity List page through a record Detail page, then some of these features may not be available.

To do this	Follow these steps
Add activities to books or remove activities from books	On the Activity List title bar, click Menu, and select Batch Assign book. Complete the steps described in Assigning Records to Books.
Create a new list of activities	On the Activity List title bar, click Menu, and select Create New List. Complete the steps described in Creating and Refining Lists (on page 118).
Create a task	On the Activity List title bar, click New Task. On the Task Edit page, enter the required information and save the record.
Create an appointment	On the Activity List title bar, click New Appointment. On the Appointment Edit page, enter the required information and save the record.
Delete all records from the list	On the Activity List title bar, click Menu, and select Batch Delete. Complete the steps described in Deleting and Restoring Records (on page 161).
Export the list	On the Activity List title bar, click Menu, and select Export List. Complete the steps described in Exporting Records in Lists (on page 131).
Find an activity (task or appointment)	Click the Subject column header to sort the data. Then click on a letter in the alphabet bar. For activities beginning with numbers, click 0-9.
Manage all the activities lists	On the Activity List title bar, click Menu, and select Manage Lists. Complete the steps for your required task as described in Manage Lists Page (on page 128).
Refine the search criteria for the list	On the Activity List title bar, click Menu, and select Refine List. Complete the steps described in Creating and Refining Lists (on page 118).
Restore a deleted list of records	On the Activity List title bar, click Menu, and select Batch Restore. For more information about restoring deleted lists of records, see Deleting and Restoring Records (on page 161).
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select the number of records to be seen at any one time.
Update a group of activity records in one go	On the Activity List title bar, click Menu, and select Mass Update. Complete the steps described in Updating Groups of Records (on page 137).
Update an activity	Edit fields inline on the Activity List page or select the activity to open the Details page. For more information on updating records, see Updating Record Details (on page 103).
View a subset of activities (tasks or appointments)	On the Activity List title bar, click the drop-down list and change the selection (Completed Tasks, Open Tasks, My Tasks, or My Appointments).

To do this	Follow these steps
View all activities (tasks and appointments)	On the Activity List title bar, click the drop-down list and select All Activities.

Standard Activity Lists

The following table describes the standard lists.

Activity List	Filters
Completed Tasks	Tasks that have a completed date in the past
Delegated Tasks - Completed	Tasks that have your name in the Delegated By field and that have a completed date in the past
Delegated Tasks - Open	Tasks that have your name in the Delegated By field and that have a blank completed date or a completed date in the future
Delegated Tasks - Overdue	Tasks that have your name in the Delegated By field and that are overdue
My Activities	All of your activities, including tasks and appointments
My Appointments	All of your appointments
My Daily Calls	Referral calls, review calls, or birthday calls to make today
My Open Tasks	Your tasks on which the Completed check box is not selected and that are due to be completed in the next 90 days
My Tasks	All of your tasks
My Weekly Calls	Referral calls, review calls, or birthday calls to make this week
Open Activities	Combined list of: ■ Tasks assigned to you that have a blank completed date or a completed date in the future ■ Future appointments that are assigned to you
Open Tasks	Tasks on which the Completed check box is not selected and that are due to be completed in the next 90 days
Planned Calls	Your planned calls **NOTE:** This list is specific to Oracle CRM On Demand Life Sciences Edition.

Limiting Activity Records Displayed

You can limit the activities you see by selecting a filtered list. A list shows a subset of the activities that meet the criteria saved within the list.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Before you begin. When you create a list, you need to enter the fields and values for the criteria you set up. You might want to go to the Task Edit or Appointment Edit page and write down the exact field names and values as they are used in your application. Otherwise, your filtered list might not pick up the correct records. Alternatively, you can print the record Detail page to capture the exact field names; however, the printout does not capture all of the available field values for drop-down lists.

To open a filtered list for activities

1   Click the Calendar tab.

2   On the Calendar Page, in the Open Tasks section, click Show Full List.

3   On the Activities List page, change the selection in the drop-down list.

To create a filtered list for activities

1   Click the Calendar tab.

2   On the Calendar Page, in the Open Tasks section, click Show Full List.

3   On the Activity Lists page, click Menu and select Manage Lists.

4   On the Manage Lists page, click the New List button.

5   Complete the steps described in Creating and Refining Lists (on page 118).

Marking Tasks as Completed

You can mark tasks as Completed. A completed task remains in certain lists, such as All Activities or My Activities. However, completed tasks do not remain on My Homepage.

If a task that you mark as completed is linked to a record, then the task moves from the list of open activities or tasks to the list of completed activities on the Detail page for that record.

To mark a task as Completed

1   Select the task.

For instructions on selecting tasks, see Finding Records (on page 68).

2 On the Task Detail page, click the Mark as Completed button.

After you mark a task as completed, Oracle CRM On Demand sets the Status field on the task to Completed, provided that your company uses the default set of values for the Status field.

Assigning Activities to Another Employee

You can assign an activity to another employee if you have edit access to the record. Generally, you can edit a record if you own it or if the owner reports to you. However, access levels can be adjusted to restrict a user's access.

After you assign an activity to another employee, the activity automatically appears in the new user's My Activities or My Tasks list. The assigned activity also maintains all prior associations for the activity. If the Delegated By field is blank when you assign the activity to another owner, then your name automatically appears in the Delegated By field after the activity is reassigned. However, if the Delegated By field is already populated with the name of a user, then the field is not automatically updated when you reassign the activity. If necessary, you can manually update the field so that it shows your name or the name of any other user. You can use the lists of delegated tasks to track tasks that are not assigned to you but have your name in the Delegated By field. The lists of delegated tasks are available in the picklist of lists on the Activity Lists page.

To assign an activity to another employee

1 Select the activity.

For instructions on selecting activities, see Finding Records (on page 68).

2 On the Appointment Detail or Task Detail page, position your cursor in the Owner field, and click the Lookup icon.

3 In the Lookup window, click the Select link beside the name of the new owner.

The name of the new owner appears in the Owner field on the Appointment Detail or Task Detail page.

Tracking Visits (Sales Calls) to Customers

NOTE: This feature is available in Oracle CRM On Demand Life Sciences Edition only. In addition, the information in this topic assumes that your company uses the default set of values for the Status picklist field. However, if your administrator changes the standard set of values in the Status picklist field, then the activity processing in Oracle CRM On Demand might not work as described in this topic.

You can do the following in the Call Detail page:

■ Track visits (sales calls) to customers, recording information such as the products you discussed, the samples, promotional or educational items you left, solutions you discussed, and related contacts. You can track visits (sales calls) to customers in one of the following ways:

■ By adding products detailed, samples dropped, sample request, and promotional item information to the parent call.

■ By adding attendees to the parent call and then tracking the products detailed, samples dropped, sample request, and promotional item information for each individual attendee record.

NOTE: An *attendee* is an individual who is present for a meeting or phone call.

If using attendees to track visits (sales calls) to customers, note the following:

■ All attendees will inherit any product detailed information recorded on the parent call.

■ Attendee information will not impact the primary contact information on the parent call.

■ Save the information as a template, called a *Smart Call*. The Smart Call template is helpful when you are visiting multiple customers for the same purpose, such as enrolling clinical investigators. You can keep the template private or make it available for others to use (public).

When you apply the Smart Call template to a new call, most information from the smart call automatically populates the new record, including the products detailed, promotional items dropped, and samples dropped information related to the call. However, other fields, such as Lot Numbers for the samples dropped, are not saved as part of the template.

After you apply the Smart Call template to a call, you can then update the remaining fields to track the details of this visit.

If your company administrator included the Last Call Date field on your Account or Contact Edit page, this field is automatically updated on the linked account and all linked contacts. The update occurs when you change the call record's status to Completed and then save the record. The field reflects the start time and date of the call.

NOTE: Oracle CRM On Demand Disconnected Mobile Sales can coexist with Smart Call configuration in Oracle CRM On Demand but does not support or respond to Smart Calls.

For more information on Smart Calls, see Managing Smart Calls.

■ Submit the call information for use in the reconciliation process for inventory periods.

Oracle CRM On Demand Life Sciences Edition does the following after call detail information is submitted:

■ Sets the Call Activity status to Submitted.

■ Locks any Call Detail records with a status set to Submitted to prevent any changes or deletions of those records. For information about record locking for call activity records, see Configuration Guide for Oracle CRM On Demand Life Sciences Edition.

■ Creates a disbursement transaction that is used in the reconciliation process for the Inventory Period. For more information, see Reconciling an Inventory Period (on page 610), Process of Reconciling the Inventory (on page 614), Viewing Disbursement Transactions (on page 628).

NOTE: If the call record does not contain a valid contact state licence or an associated signature record, and the validation checks for these conditions have been set up by your administrator on the Life Science Related Preferences page, then Oracle CRM On Demand displays an error message and prevents the call submission. For information on the relevant preferences, see the information on Enable Contact State Licence Validation and Enable Signature Validation in Setting Life Sciences Related Preferences.

Limitations When Changing the Primary Contacts Used in Contact Calls

If you have saved a contact call and then change the primary contact used in the call, then the following occurs:

■ The call is listed under the original primary contact and the new primary contact.

■ The call uses the new primary contact in both places.

■ The subject line remains the same in both calls.

The following example explains the outcome of changing the primary contact:

1 You create two contacts: Jack and Jill.

2 You create a contact call for contact Jack, Call_Jack.

 The primary contact is set to Jack in this call.

3 You change the primary contact in the Call_Jack call to *Jill.*

 Oracle CRM On Demand automatically creates a second call under contact Jill, but it uses the original subject (Call_Jack). The Call_Jack call is now listed under both contacts Jack and Jill. If required, you can change the subject line of the call listed under Jill to something more suitable such as *Call_Jill.*

Before You Begin:

■ To add, edit or submit calls (account calls or contact calls), your role must include the Calls: Enable Call Detailing privilege.

■ To manage access to calls and configure an automated call submission to the Oracle CRM On Demand Disconnected Mobile Sales application, your role must include the Calls: Manage Calls privilege. Typically, this privilege is given to company administrators only.

To track a visit (sales call) to a customer

1 On the Accounts or Contacts Homepage, open the account or contact for your visit.

 For instructions on selecting records, see Finding Records (on page 68).

 NOTE: You can plan a visit (sales call) for up to twenty five customers at one time by using the mass call planning feature in Oracle CRM On Demand. For more information about creating a planned call for multiple customers, see Mass Call Planning (on page 204).

2 On the Account Detail or Contact Detail page in the Calls section, click New Call or Auto Call to create a new call record.

 NOTE: If the Calls section is not visible on your Details page, click the Edit Layout link in the upper-right corner of the page, and add the Calls section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

 ■ Clicking New Call brings you to the Call Edit page where you must enter most information manually for the new call record.

  Make sure that you specify Call in the Type field. Otherwise, the following related items will not be available to you: Samples Dropped, Promotional Items, Products Detailed.

■ Clicking Auto Call brings you to the Call Detail page where the following field data is filled automatically in for the new call record:

   ■ The Status field has a value of Planned.

   ■ The End Date field has a value equal to the Start Date plus 30 minutes.

   ■ The Subject field has a value of Automated Call, and it shows the Account or Contact name.

   ■ The Type field has a value of Call.

   WARNING: Oracle CRM On Demand Life Sciences customers must not attempt to disable or customise Type=Call.

3 On the Call Edit or Call Detail page, do the following:

   a To populate the new call record with information from an existing smart call template, click the Lookup icon next to the Smart Call field and select the smart call.

   b Enter or update the information.

   The table describing call record fields at the end of this procedure provides additional information regarding some of the fields.

   NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help. Custom fields that your company administrator defined are saved in the Smart Call template.

4 Save the record by doing one of the following:

   ■ On the Call Edit page, click Save.

   ■ On the Call Detail page, click either Save as a Private Smart Call or Save as a Public Smart Call.

   For more information, see Saving Call Detail Information as a Template (on page 649).

5 Next, do one of the following on the Call Detail page as required:

   ■ Add products detailed, samples dropped, sample request, or promotional item line items to the parent call record.

   ■ Add an attendee line item to the parent call record, then add products detailed, samples dropped, sample request, or promotional item line items to the attendee record.

   For more information about these tasks, see the following topics:

   ■ Adding Attendees to Calls (on page 632)

   ■ Linking Product Detailed Information to Calls (on page 636)

   ■ Linking Samples Dropped Information to Calls (on page 640)

   ■ Linking Promotional Item Information to Calls (on page 643)

   ■ Linking Sample Request Information to Calls (on page 645)

6 Click Submit to submit the call detail information for processing, see Submitting Call Detail Information for Inventory Tracking.

Field	Description
Key Call Information	
Subject	Limited to 100 characters. The name of the Smart Call template.
Primary Contact	Automatically populated.
	If this call is linked to both an account and contact, the call record appears as related information on both the Account and Contact Detail pages.
	NOTE: This field is not copied to the new record when you create a new call record from a smart call template.
Account	Automatically populated and read-only.
	If this call is linked to both an account and contact, the call record appears as related information on both the Account and Contact Detail pages.
	NOTE: This field is not copied to the new record when you create a new call record from a smart call template.
Address	Displays the full address, which is taken from the individual address fields for the account or contact record.
	NOTE: This field is not copied to the new record when you create a new call record from a smart call template.
Smart Call	If your user role includes the privilege, you can select a Smart Call template.
	NOTE: This field is not copied to the new record when you create a new call record from a smart call template.
Status	Status of visit (call), which can be one of the following: Assigned, Completed, Deferred, In Call, In Chat, In Progress, Not Started, Planned, Signed, Submitted, Submitting, Waiting for Someone Else.
	Oracle CRM On Demand Life Sciences Edition uses the following status values when it is processing calls:
	■ **Planned.** The call appears on the Calendar and in the Planned Calls section on the Calendar pages. To see planned calls on the Calendar and in the Planned Calls section on the Calendar page, your user role must include the Calls: Calendar Planned Calls privilege.
	■ **Signed.** The content of the call has been acknowledged by the call recipient. Oracle CRM On Demand Life Sciences Edition locks the call, and you cannot make any further changes to the dropped samples, dropped promotional items, or sample requests for the call.
	■ **Submitted.** Oracle CRM On Demand Life Sciences Edition has processed the call and created transactions for reconciliation after the user has clicked Submit on the Account Call Detail or Contact Call Detail page.
	■ **Submitting.** The Oracle CRM On Demand Disconnected Mobile Sales application sets

Field	Description
	this status, which triggers workflow rules that your company administrator configures to update the call record. The Submitting status and workflow rules are used to support the integration of Oracle CRM On Demand with the Oracle CRM On Demand Disconnected Mobile Sales application. **NOTE:** The Signed or Submitting status triggers a call submission to the Oracle CRM On Demand Disconnected Mobile Sales application if your company administrator has configured the workflow run-time event action for the Activity record. For information on how to configure this run-time event action, see *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*. For general information about configuring workflow rules, see Workflow Configuration. **NOTE:** This field is not copied to the new record when you create a new call record from a smart call template.
Activity Currency	You can select a different currency to convert the price to another currency, if your company administrator has set up this feature.
Objective	Limit of 1,500 characters
Start Time	Date and time the call starts. Defaults to today's date and 12:00 p.m. **NOTE:** This field is not copied to the new record when you create a new call record from a smart call template.
Duration	Calculated field (in minutes) based on start time and end time. **NOTE:** This field is not copied to the new record when you create a new call record from a smart call template.
End Time	Defaults to start time plus 30 minutes. **NOTE:** This field is not copied to the new record when you create a new call record from a smart call template.
Type	The can be one of the following: Call, Correspondence, Demonstration, Email, Event, Fax, Meeting, Personal, Presentation, Other, or To Do. To perform samples management, you must choose Call.
Call Type	(Read-only) Displays Account Call, Professional Call, Attendee Call, or General Call depending on the type of call. **NOTE:** The Call Type field defaults to Professional Call for contact calls, Account Call for parent account calls, and Attendee Call when adding attendees to the parent account call.
Ref #	Text field that can be used to store the reference number of a related item such as a signed document. **NOTE:** This field is not copied to the new record when you create a new call record from a smart call template.
Additional Information	

Field	Description
Cost	**NOTE:** This field is not copied to the new record when you create a new call record from a smart call template.
Paper Sign	**NOTE:** This field is not copied to the new record when you create a new call record from a smart call template.
Private	**NOTE:** This field is not copied to the new record when you create a new call record from a smart call template.
Description	Limit of 16,350 characters.
Next Call	Limit of 1,500 characters. **NOTE:** This field is not copied to the new record when you create a new call record from a smart call template.

Related Topics

See the following topics for related information about tracking visits to customers:

- Dropping Samples During a Sales Call (on page 630)

- Setting the Maximum Number of Times Contacts Can be Sampled

- Authorising Contacts to Receive Samples

- Tracking the Best Calling Times (on page 306)

Mass Call Planning

You can create a planned call for one or more customers in the following ways:

- From the Account Detail or Contact Detail page with a status of Planned.

  For more information about creating a planned call for a customer from the Account Detail or Contact Detail page, see Tracking Visits (Sales Calls) to Customers (on page 198).

- From the Account List or Contact List page using the mass call planning feature.

  For more information about creating a planned call for multiple customers from the Account List or Contact List page using the mass call planning feature, see the following procedures.

When the status of your call is set to Planned, the call appears on the calendar and in the Planned Calls section on the Calendar page. The Planned Calls section on the Calendar page lists up to two weeks of planned calls in chronological order for the sales representative and displays the following information for each planned call: call date and start time, time of day, subject, contact to be visited, and other contact address information.

The colour coding that is used in the Planned Calls section on the Calendar pages is determined by the theme that you use, as follows:

■ Overdue planned calls with a start date that is in the past appear in the colour that your administrator selects for the alert text in the theme.

■ Upcoming planned calls with a start date that is in the future appear in the colour that your administrator selects for the page links in the theme.

NOTE: To see planned calls on the Calendar and the Planned Calls section on the Calendar page, your user role must include the Calls: Calendar Planned Calls privilege.

You can create a planned call for up to 25 customers by using the mass call planning feature in Oracle CRM On Demand. Use the following procedure to create a planned call for multiple contacts.

NOTE: A planned call is created for the first appropriate day within the seven days after the current day. For example, if today is Tuesday, and if you select Wednesday as the day for a planned call, then the call is created for tomorrow. However, if you select Tuesday as the day for a planned call, then the call is created for Tuesday of next week rather than for today, even if the time of day that you select is later than the current time. Also, only one instance of each planned call is created, that is, you cannot set up planned calls to recur at intervals.

To create a planned call for multiple contacts at one time

1 Go to the Contacts Homepage.

2 Select the contact list that you want in the Contact Lists section of the page.

3 On the Contact List page, click Menu, and select Mass Call Planning.

4 On the Planned Calls page, enter the following information for each contact that you want to include in your mass call plan:

■ Enter the day of the week that you plan to call.

The valid options are: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday.

■ Enter the best time to call.

The valid options are: Early Morning (7 to 9 am), Morning (9 to 11 am), Mid Day (11 am to 1 pm), Early Afternoon (1 to 3 pm), Afternoon (3 to 5 pm), Early Evening (5 to 7 pm), Late Evening (7 to 9 pm), and Late Night (9 to 11 pm).

5 Click Finish.

On the Calendar page, all the planned calls are now visible on the Calendar and in the Planned Calls section of the page, provided your user role includes the Calls: Calendar Planned Calls privilege. An information message displays above the Calendar indicating the number of planned calls that were created.

6 Click the appropriate link on the Calendar or the appropriate Subject link in the Planned Calls section of the Calendar page to open the Call Detail page.

The following field data is filled in automatically for each new call record created through mass call planning:

■ The Status field has a value of Planned.

- The Start Date has a value that combines the Day of the Week and Best Time to Call.

- The End Date field has a value equal to the Start Date plus 30 minutes.

- The Subject field has a value of Professional Call plus the Contact Name.

- The Type field has a value of Call.

7 Enter or update the information in the remaining fields on the Call Detail page as required.

For example, to populate the new call record with information from an existing smart call template, click the Lookup icon next to the Smart Call field, and select the smart call.

For more information about the fields on the Call Detail page, see Tracking Visits (Sales Calls) to Customers (on page 198).

8 If required, add line items to the call record, and then click either Save as a Private Smart Call or Save as a Public Smart Call.

You can link product detailed information, samples dropped information, and promotional items to the call record. For more information about adding line items to a call record, see Tracking Visits (Sales Calls) to Customers (on page 198).

Use the following procedure to create a planned call for multiple accounts.

To create a planned call for multiple accounts at one time

1 Go to the Accounts Homepage.

2 Select the account list that you want in the Account Lists section of the page.

3 On the Account List page, click Menu, and select Mass Call Planning.

4 On the Planned Calls page, enter the following information for each account that you want to include in your mass call plan:

- Enter the day of the week that you plan to call.

  The valid options are: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday.

- Enter the best time to call.

  The valid options are: Early Morning (7 to 9 am), Morning (9 to 11 am), Mid Day (11 am to 1 pm), Early Afternoon (1 to 3 pm), Afternoon (3 to 5 pm), Early Evening (5 to 7 pm), Late Evening (7 to 9 pm), and Late Night (9 to 11 pm).

5 Click Finish.

On the Calendar page, all the planned calls are now visible on the Calendar and in the Planned Calls section of the page, provided your user role includes the Calls: Calendar Planned Calls privilege. An information message displays above the Calendar indicating the number of planned calls that were created.

6   Click the appropriate link on the Calendar or the appropriate Subject link in the Planned Calls section of the Calendar page to open the Call Detail page.

The following field data is filled in automatically for each new call record created through mass call planning:

- The Status field has a value of Planned.

- The Start Date has a value that combines the Day of the Week and Best Time to Call.

- The End Date field has a value equal to the Start Date plus 30 minutes.

- The Subject field has a value of Account Call plus Account Name.

- The Type field has a value of Call.

7   Enter or update the information in the remaining fields on the Call Detail page as required.

For example, to populate the new call record with information from an existing smart call template, click the Lookup icon next to the Smart Call field, and select the smart call.

For more information about the fields on the Call Detail page, see Tracking Visits (Sales Calls) to Customers (on page 198).

8   If required, add line items to the call record, and then click either Save as a Private Smart Call or Save as a Public Smart Call.

You can link product detailed information, samples dropped information, and promotional items to the call record. For more information about adding line items to a call record, see Tracking Visits (Sales Calls) to Customers (on page 198).

About Ownership of the Planned Calls

The ownership of a planned call is determined as follows:

- If the Activity record type is configured in user mode, then the user who creates the planned call becomes the owner of the call by default.

- If the Activity record type is configured in mixed mode, then the Owner field on the planned call is blank by default. However, the first time that the call is edited, the user who edits it might be prompted to populate either the Owner field or the Book field for the call, depending on how your administrator sets up these fields.

- If the Activity record type is configured in book mode, then for the call to be created successfully, at least one of the following conditions must be true:

  - A custom book is selected as the default book for the Activity record type on your user record.

  - A custom book is selected as the default book on your user record.

After you create the planned call, the Owner field and the Book field on the call are both blank. However, the first time that the call is edited, the user who edits it is prompted to populate the Book field, as this is a required field when the Activity record type is configured in book mode.

Related Topics

See the following topics for related information:

- ■ Tracking Visits (Sales Calls) to Customers (on page 198)
- ■ Dropping Samples During a Sales Call (on page 630)

Adjusting Message Responses

A *message response* is feedback received from the audience during the presentation of a messaging plan during a particular period. The feedback is based on mouse clicks or taps of a tablet pen made by the presenter. Such feedback is collected continuously throughout a messaging plan delivery and is tracked by time and the specific messaging plan item being presented. For more information on messaging plans, see Messaging Plans (on page 694).

The message responses that are displayed are collected and populated from the PCD delivery software. The responses that are relevant to past interactions must be displayed in Oracle CRM On Demand. The modification privileges to these responses must be granted only to administrative persons who have authority to retroactively adjust message-plan responses.

Your user role must include the Manage Personalised Content Delivery privilege to work with the Message Response pages.

NOTE: This feature is available in Oracle CRM On Demand Life Sciences Edition only. The Message Response record is available only as a related item of a Call record and is not available as a top-level record type.

To adjust a message response

1 From a Call Detail page, scroll to the Message Responses related item section, and click New.

  NOTE: You might need to add the Message Responses section to your Call Detail page. For information about personalising Detail page layouts, see Changing Your Detail Page Layout (on page 855). If the Message Responses section is not available to add to your page layout, then contact your company administrator.

2 From the Message Response Edit page, view and adjust the following fields, if required.

Field	Description
Key Message Response Information	
Name	The name assigned to the message response record. (Required field.)
	NOTE: By default, the Name field is a read-only field. It is read-only to maintain compatibility with previous releases. However, because this field is also a required field, your company administrator must customise the Message Response page layout so that the Name field is editable to be able to save the Message Response record.
Messaging Plan	The messaging plan being shown for a given message response. Click the Selector icon to choose an existing messaging plan.

Field	Description
Sequence	The sequence number of the messaging plan item corresponding to a particular response. (Required field.)
Messaging Plan Item	This field identifies the specific messaging plan item being shown with the messaging plan.
Product	The product associated with the parent messaging plan. Use the Lookup icon to select a product. (Required)
	NOTE: The Product field value must be the same as the parent Messaging Plan record. However, Oracle CRM On Demand does not enforce this requirement. You must ensure this value is the same as the parent Messaging Plan manually. If you do not, then you encounter data integrity issues. For example, if you have the Product field set to AAAA in the Messaging Plan, and if you update the Product field from AAAA to BBBB in any of the child PCD records (Messaging Plan Item, Messaging Plan Item Relations, or a Message Response) by using Web services, then the child PCD record describes product BBBB incorrectly, instead of product AAAA.
	NOTE: This field is not set up by default. If you require this field, then contact your company administrator to set it up, or see Configuration Guide for Oracle CRM On Demand Life Sciences Edition.
Solution	The underlying multimedia or graphic file content which is the subject of the response.
	Before Release 23, the Solution field was a required field by default. However, for Release 23, this field is no longer required by default. However, if your company has customized the page layout for this record type that occurred before Release 23, then the Solution field remains a required field for those customized layouts. To change this field to Not Required, your company administrator must deselect the Required check box for the Solution field that was set up in the customized page layout for this record type. For more information on field setup, see Creating and Editing Fields.
Response	The preconfigured values for responses are as follows: Continue Discussion, Need Data, Accepted, Not Interested, Rejected, or Not Shown. Select a value from the drop-down list.
Notes	Additional descriptive information about the response.
Section	A component of a presentation item (for example, a graph) that might be activated during a presentation by the presenter. This component is the subject of a given response value.
Start Time	The beginning of the response period when the first message response was received. To adjust, click the calendar icon to select the start date and time.
End Time	The end of the response period when the last message response was received. To adjust, click the calendar icon to select the end date and time.

Field	Description
Duration	The period (in seconds) between the start time and end time.
Follow-up	The presenter selects this check box during the presentation of a messaging plan to indicate that a follow-up request has been submitted for a particular segment of the messaging plan. A follow-up request can include sending literature, and so on. This field is not selected by default.
Type	The message response category. Use the picklist to select a type.
	The default values for the Type field are Message Response and Outcome. Selecting a type can result in a different page layout from the default page layout for message responses if your administrator has set up dynamic page layouts for this record type. For example, selecting Outcome can result in a Message Outcome page layout, if it was set up by your administrator. For more information on setting up dynamic page layouts for this record type, see Specifying Dynamic Page Layouts and also see the topics about page layouts in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.
	NOTE: This field is not set up by default. If you require this field, then contact your company administrator to set it up, or see *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.

NOTE: The Start Time, End Time, Follow-up, and Response fields were required fields in releases earlier than Release 24. In Release 24, these fields are no longer required fields.

3 Save the record if you have adjusted any of the fields.

Scheduling Appointments with Others

If you want to schedule an appointment and notify others of the appointment, perform the following steps:

1 Create an appointment.

2 Invite contacts and users.

When scheduling appointments with others, the application distinguishes between:

- **Contacts.** Customers, partners and so on who are listed in your company information as contact records.

- **Users.** Oracle CRM On Demand users at your company.

3 Check the users' availability

You can view the availability of users, but not contacts, since you do not have access to calendars that reside outside of the application.

NOTE: To perform this step, your user role must include the Share Calendar privilege.

4 Send notification of the appointment to all invitees.

To add invitees to the appointment

1 Create the appointment; fill in the appointment information, and save the record.

2 On the Appointment Detail page, scroll down to the Contacts section and click Add.

NOTE: You might have to add the Contact and User sections to your layout. For information about personalising Detail page layouts, see Changing Your Detail Page Layout (on page 855).

3 In the Lookup window, select an existing contact, or click New and create the contact record.

The selected contacts appear in alphabetical order.

4 Click OK.

NOTE: To change which contact appears as the Primary Contact, click the Edit link beside the appointment on the Calendar page. On the Appointment Edit page, click the Lookup icon beside the Primary Contact field, select the new primary contact and click Save. The primary contact appears in the Calendar summary. The new primary contact is also added to the Contacts section of the Appointment Detail page, if it was not already included there.

5 On the Appointment Detail page, scroll down to the Users section and click Add.

6 In the Lookup window, select the users you want to invite to the appointment.

The list that appears in the Lookup window contains all Oracle CRM On Demand users at your company.

7 Click Save.

To check the users' availability

1 On the Appointment Detail page, click User Availability.

For the User Availability button to appear, your user role must include the Share Calendar privilege.

A combined calendar appears showing the list of users and their calendars. Rows for users who have not shared their calendar with you appear as blank bars.

To view information about busy time shown on the calendar, hover your mouse pointer over the appointment.

2 To view the availability on another day, you can:

- ■ Click the arrows on the calendar header to scroll to the next day or previous day

- ■ Click the calendar icon on the calendar header

3 Update the appointment date and time, if necessary.

4 Save the record.

CAUTION: No warning message appears if you create an overlapping appointment.

To send an email notification to the invitees (contacts and users)

1 On the Appointment Detail page, click Send Email.

2 An email opens with the following information:

- **To.** Invitees (contacts and users)

  If your list exceeds 70 invitees, the email is sent to the remaining invitees, but their email addresses do not appear in the To line.

- **Subject.** The Subject line in the email includes the word *Appointment* followed by the values of the Subject, Location, Start Time, and End Time fields from the appointment. You can edit the content of the Subject line in such emails. However, if the character set for your user language uses multibyte characters, then you must enable support for Unicode (UTF-8) in your email client. For information about enabling support for Unicode (UTF-8) in an email client, see the help documentation for the email client.

Related Topics

See the following topics for related information:

- Activity Fields (on page 222)
- Setting Your Default Calendar View (on page 217)
- About Activity Reminders (on page 189)

Saving Appointments as iCalendar Files

This topic describes how to save appointments as iCalendar files. It applies only to calls and appointments.

Oracle CRM On Demand enables you to save appointments in the iCalendar file format. This functionality enables you to store the details of your appointments so that you can transfer them to other computers or devices, such as mobile devices, and then open them in applications that support the iCalendar format.

Attachments

When you save an appointment as an iCalendar file, Oracle CRM On Demand tries to include all of the appointment's attachments in the iCalendar file. However, the maximum allowed size for an iCalendar file that is saved from Oracle CRM On Demand is 500 megabytes (MB). Depending on the size of the attachments, some of the attachments might not be included in the iCalendar file. Oracle CRM On Demand selects the attachments to be added to the iCalendar file as follows:

- Oracle CRM On Demand sorts and adds the attachments, including both the file and URL attachments, in ascending alphabetical order. The order is based on the Attachment Name field.

- Before adding an attachment to the iCalendar file, Oracle CRM On Demand calculates whether the attachment will cause the iCalendar file to exceed the maximum allowed size. If the attachment will not

cause the iCalendar file to exceed the maximum allowed size, then the attachment is added to the file. If the attachment will cause the iCalendar file to exceed the maximum allowed size, then Oracle CRM On Demand skips that attachment and continues to the next attachment in the list.

TIP: Consider renaming your attachments so that the most important attachments appear at the start of the list of attachments when the list is sorted in ascending alphabetical order on the Attachment Name field.

The following procedure describes how to save an appointment as an iCalendar file.

To save an appointment as an iCalendar file

◼ Perform one of the following:

  ◼ In the daily, weekly, or monthly calendar view, click the Save as iCalendar link for the appointment that you want to save.

  ◼ In an Appointment Detail page or a Call Detail page, click Save as iCalendar.

Depending on your browser settings, you might be asked to specify the location where you want to save the iCalendar file. The iCalendar file is saved with the .ics file extension by default.

Related Topic

See the following topic for related information:

◼ About the Information in iCalendar Files (on page 213)

About the Information in iCalendar Files

This topic describes the information that Oracle CRM On Demand writes to iCalendar files. It applies only to calls and appointments.

When you save an appointment as an iCalendar file, information from Oracle CRM On Demand is written to certain properties in the iCalendar file. The information that is written to the iCalendar file includes information from the appointment, as well as information from the users, contacts and attachments that are linked to the appointment. The following table shows the information that is written from Oracle CRM On Demand to the iCalendar properties.

iCalendar Property	Oracle CRM On Demand Fields	Description
ORGANISER	Owner	The full name of the user who is the owner of the appointment. **NOTE:** If the appointment has no contacts or users linked to it other than the user who owns the appointment, then the ORGANISER property is not included in the iCalendar file.
ATTENDEE	Name and Email	◼ Each user that is linked to the appointment in Oracle CRM On Demand is added as an attendee in the iCalendar file. The full name and email address of the

iCalendar Property	Oracle CRM On Demand Fields	Description
		user are written to the iCalendar file. ■ Each contact that is linked to the appointment in Oracle CRM On Demand is added as an attendee in the iCalendar file. The full name and email address of the contact are written to the iCalendar file.
SUMMARY	Subject	The content of the Subject field of the appointment.
LOCATION	Location	The content of the Location field of the appointment.
DTSTART	Start Time	The start date and time of the appointment. An appointment that starts at 12:00 A.M. on a certain day and ends at 12:00 A.M. on the following day is considered an all-day appointment. For such all-day appointments, VALUE=DATE is written to the iCalendar file.
DTEND	End Time	The end date and time of the appointment. An appointment that starts at 12:00 A.M. on a certain day and ends at 12:00 A.M. on the following day is considered an all-day appointment. For such all-day appointments, VALUE=DATE is written to the iCalendar file.
DESCRIPTIONS	Description	The content of the Description field on the appointment.
UID	Row Id	The row ID of the appointment record.
CREATED	Created: Date External	The date and time when the appointment was created.
LAST-MODIFIED	Modified: Date External	The date and time when the appointment was last updated.
ATTACH	File and attachment content, or Attachment Name and URL	For a file attachment, the file name and the content of the file are included in the iCalendar file. The content of the file is encoded using Base64 encoding. For a URL attachment, the attachment name is included as a file name with the .txt file extension. The URL is included as the content of the text file and is encoded using Base64 encoding.

Related Topic

See the following topic for related information:

■ Saving Appointments as iCalendar Files (on page 212)

Viewing the Calendars of Other Users

Before you begin. To perform this procedure, your user role must include the Share Calendar privilege.

You can view:

- Another user's calendar

  You can view the individual calendars of users in your group (if you are a member of a group) and the calendars of other users who explicitly share their calendar with you.

  NOTE: You cannot view the calendars of the users who report to you unless those users are members of a predefined group of which you are also a member, or the users explicitly share their calendar with you.

- A group calendar (if you are a member of a group) that combines the calendars of all the members of your group into a single calendar view

  NOTE: The list shows the users in alphabetical order. If the list exceeds ten users, scroll through the list to view the additional users' calendars.

  For more information about groups, see Group Management.

- Custom views that combine other users' calendars

  For example, you might be working on a special short-term project with a number of users in different functions. Setting up a custom view that includes calendars for only those users allows you to see the schedule for those users in a single view. When you set up a custom calendar view, you can add the following users to the view:

  - Users who are members of your group (if you are a member of a group)

  - Users who explicitly share their calendar with you

  For more information on setting up custom calendar views, see Adding Custom Calendar Views (on page 219).

The calendars show the times in your local time zone, from 7 a.m. to 7 p.m. Also, only invitees and owners of appointments can view the details for private appointments.

To view another user's calendar

1 On the Calendar page, click the User tab, if necessary.

2 In the title bar, click the Lookup icon and click the Last Name of the user in the Lookup window.

   That user's calendar populates the User view.

   NOTE: Only users who share their calendars with you, and users who are members of your group, are available to select.

To quickly return to your own calendar

- Click the My Calendar button on the title bar.

To view a combined calendar for all group members

1 On the Calendar page, click the Group tab.

2 On the combined calendar, you can:

- Click the user's name to go to the user's personal calendar.

- Click the date to go to the group view for that day.

Related Topics

See the following topic for related information about custom calendar views:

Adding Custom Calendar Views (on page 219)

Calendar Settings Page

Click a topic to see instructions for doing the following from the Calendar Settings page:

- Sharing Your Calendar (on page 216)

- Setting Your Default Calendar View (on page 217)

- Adding Custom Calendar Views (on page 219)

NOTE: The calendar functions only according to the Gregorian calendar. It cannot be configured for other calendar systems.

Sharing Your Calendar

Before you begin. To perform this procedure, your user role must include the Share Calendar privilege.

To extend access to your calendar beyond your group members, you need to explicitly share the calendar to the other user.

To share your calendar

1 On the Calendar pages, click Calendar Setup.

2 On the Calendar Settings page, click Share Calendar.

If you are a member of a group, the members of your group are listed in the Default Sharing section.

3 In the My Calendar Share List section, click Add Users.

4 On the Shared Calendar page, select the users with whom you want to share your calendar.

5 Save your changes.

Setting Your Default Calendar View

This topic describes how to set up your default calendar view from the Calendar Setup link in the calendar pages.

When setting up your default calendar view, you can do the following:

■ Select the calendar view that you want to display each time that you click the Calendar tab.

■ Specify which day is shown as the first day of the week in your calendar and in the date selectors where you select values for date fields in Oracle CRM On Demand.

■ Select the days of the week and the business hours that you want to show in your calendar, if you do not want to use the company-wide settings.

By default, all of the check boxes for the days of the week are deselected, and the Business Hours Start Time and Business Hours End Time fields are blank. When specifying business hours, you can enter only one start time and one end time. You cannot specify different business hours for individual work days. If you enter a start time for your business hours, then you must also enter an end time, and the end time must be later than the start time. Similarly, if you enter an end time, then you must also enter a start time. If necessary, Oracle CRM On Demand converts the start time and end time that you enter to the appropriate format for your locale after you save your changes.

In the calendar, the time slots can start and end on the hour if you use a classic theme, and the time slots can start and end on the hour or half-hour if you use a modern calendar. For the calendar views, Oracle CRM On Demand rounds the start time for the business hours down to the nearest hour or half-hour as appropriate, and rounds the end time for the business hours up to the nearest hour or half-hour. For example, if you enter 08:40 A.M. as your start time, then Oracle CRM On Demand rounds the start time down to 08:00 A.M. for the calendar views if you use a classic theme, and rounds it down to 08:30 A.M. if you use a modern theme. If you enter 5:40 P.M. as your end time, then Oracle CRM On Demand rounds the end time up to 06:00 P.M. for the calendar views in either a classic theme or a modern theme.

For information about how the work days and business hours are shown in your calendar views, see About Calendar Work Days and Business Hours (on page 182).

■ Select additional information to display in the appointments in your calendar views. By default, the information from the Subject, Location, and Contact Name fields in the appointment is shown in the appointments in the calendar views. You can choose to display the following additional information:

   ■ The name of the account that is linked to the appointment. The account name is a link to the account record.

   ■ The status of the appointment.

   ■ The phone number of the primary contact that is linked to the appointment. The phone number is a link to the contact record. If the Work Phone field is populated on the contact record, then the work phone number is shown. If the Work Phone field is not populated on the contact record, and if the Cellular Phone field is populated, then the cellular phone number is shown.

■ Specify whether you want to receive reminders for activities that you own or on which you are included in the list of users, if reminders are configured on the activities. The options in the Activity Notification field are as follows:

   ■ **Email.** If you select this option, then you receive the email reminders.

   ■ **None.** If you select this option, then you do not receive the reminders.

■   **Blank.** If you leave the Activity Notification field blank, then the option that is selected in the Activity Notification field at company level applies to you. The default option at company level is None, but your administrator can select the Email option.

The following procedure describes how to set your default calendar view.

To set your default calendar view

1   On the Calendar pages, click Calendar Setup.

2   On the Calendar Settings page, click Default Calendar View.

3   On the Default Calendar Settings page, specify your preferences as follows:

a   Select a calendar view.

b   Select the day that is to be shown as the first day of the week in your calendar.

By default, the Calendar Week Starts On field is blank. If you leave this field blank, then the company-wide setting for the first day of the week is used.

NOTE: After you change the start day of the week, you must sign out of Oracle CRM On Demand and then sign in again to see the change in your calendar and in the date selectors where you select values for date fields in Oracle CRM On Demand.

c   In the Calendar Work Week section, set up the work days and the business hours for your calendar, as follows:

■   Select the check box for each day that you want to show as a work day in your calendar. If you select the check box for one or more days, then only those days are shown as work days in your daily and weekly user calendar views, regardless of the work days that are specified at company level. If the check boxes for all days are deselected, then the work days that are specified at company level apply to your calendar.

■   If you want to specify a start time for your business hours that is different from the time specified at company level, then enter the start time in the Business Hours Start Time field.

■   If you specified a start time for your business hours, then enter the end time in the Business Hours End Time field. The end time must be later than the start time.

NOTE: If you do not enter a start time and an end time for the business hours, then the business hours that are specified at company level apply to your calendar.

d   In the Appointment Information Preferences section, select the check boxes for the additional information that you want to display in the appointments in your calendar views.

e   In the Activity Notification field, select the option that you want, or leave the field blank if you want the setting at company level to apply to you.

f   Save your changes.

Adding Custom Calendar Views

Before you begin. To perform this procedure, your user role must include the Share Calendar privilege.

If you are a member of a group (and your role has the Share Calendar privilege), you can automatically view a merged calendar that combines the calendars of all the members in your group into a single calendar view. However, you might want to set up different, combined calendar views to meet your specific needs. To set up combined calendar views, add a custom view.

For example, you might be working on a special short-term project with a number of users across functions. Setting up a custom view that includes calendars for only those users allows you to see the schedule for those users in a single view. When setting up a custom calendar view, you can add the following users to the view:

- Users who are members of your group (if you are a member of a group)
- Users who explicitly share their calendar with you

NOTE: Custom views do not allow you to change the starting day for the week or the starting time for the day.

To add a custom calendar view

1 On the Calendar pages, click the Calendar Setup link.

2 On the Calendar Settings page, click Manage Group Views.

   On the Manage Views page, your group name appears in the Standard Views section.

3 Click Add.

4 On the Manage View page, enter a name and description of the view.

   NOTE: You cannot select an entire group to share calendars with; instead, you need to add each member of that group as a user to a custom view.

5 Save the record.

6 On the Manage Views page, click the Name of the new group.

   The Manage View Detail page appears.

7 Click Add Members, and select the users.

8 Save the record.

   On the Calendar Group tab, your new view appears in the drop-down list.

Viewing Group Task Lists

If your company uses the group assignment option, you can view the consolidated list of tasks owned by members in your group. For more information about groups, see Group Management.

To view the group tasks lists

1 On the Calendar page, click the Group Tasks tab.

2 From the drop-down list, select the list of tasks you want to view.

The lists of tasks include any tasks created by a member of your group (except tasks that users have marked as private).

Using Activity Assessment Scripts

Your company administrator might have set up assessment scripts to help you to gather information about and evaluate activities, such as tasks, appointments, and sales calls. An *assessment script* consists of a series of questions that you use to collect customer data. Your responses are scored, assigned a weight and compared with a specified threshold to determine the appropriate outcome or course of action.

NOTE: Smart Calls do not have Activity Assessments enabled at this time.

Before you begin. To use assessment scripts, your user role must be set up to allow access to the assessment records. For more information about the required settings, see About Assessment Scripts.

To use an activity assessment script

1 Select the activity.

For more information about selecting activities, see Finding Records (on page 68). For more information about activities, see Calendar and Activities (on page 177).

2 On the Detail page (Call, Appointment, or Task Detail page) for the activity, scroll down to the Activity Assessment section, and click Add.

NOTE: You might need to add the Activity Assessment section to your page layout. For information about personalising Detail page layouts, see Changing Your Detail Page Layout (on page 855).

3 In the Lookup window, search for the appropriate script, and click Select. You can use the filter fields at the top of the Lookup window to filter the list of scripts.

4 On the Activity Assessments page, select the answer for each script question, and click Save.

The Detail page (Call, Appointment, or Task Detail page) for the activity appears again.

Depending on the outcome of the script, some of the fields on the record might have been updated automatically.

About Event and Appointment Synchronisation

If your company administrator selects the Display Events in Calendar setting in the Company Profile page, then Oracle CRM On Demand displays the details of event records in the calendar. If the setting is selected, then Oracle CRM On Demand automatically maintains an associated appointment record for an event record.

Managing Calendars and Activities

When a user creates, updates, or deletes an event record through the UI, the Import Assistant, or Web services, Oracle CRM On Demand creates, updates or deletes the associated appointment record. Conversely, Oracle CRM On Demand automatically updates or deletes the original event record whenever you update or delete the corresponding appointment record for the event through the same channels.

For example, consider an event named Cardiologist's Conference that is scheduled to take place from 7/20/2015 09:00 A.M. to 7/20/2015 05:00 P.M. at the Marriott Hotel. Oracle CRM On Demand creates an appointment record as follows:

■ Sets the subject to Cardiologist's Conference

■ Sets the appointment time and dates to begin at 09:00 AM on 7/20/2015 and end at 05:00 PM on 7/20/2015

■ Sets the location to Marriot Hotel

■ Sets the activity type to Event

Oracle CRM On Demand displays the appointment for the event in the Oracle CRM On Demand calendar. Moreover, calendars for other products that are synchronized with Oracle CRM On Demand such as Oracle CRM On Demand Desktop also display the appointment.

The following table shows the mapping of fields between an event record and its corresponding appointment record.

Event Record Field	Appointment Record Field
Name	Subject
Start Time	Start Time
End Time	End Time
Location	Location
Owner	Owner
Book	Book

When a user creates an event, Oracle CRM On Demand creates the corresponding appointment and copies these fields from the event to the appointment. In addition, Oracle CRM On Demand copies certain child records for an event such as, a user added to an event team, or a book that is added to an event. Similarly, Oracle CRM On Demand creates these child records for events when they are created on an appointment record. In the calendar entry that Oracle CRM On Demand creates for an event, it displays the name and location of the event as the subject and location of the appointment, with the location in parentheses. Clicking on the Subject link, takes you to the Appointment Detail page, as with any non-event calendar entry.

NOTE: For pre-existing event records, whenever the user updates an event and saves it, Oracle CRM On Demand automatically creates the appointment, along with the book and user child records, from that point in time. That is, Oracle CRM On Demand does not display old events in the calendar until the user updates and saves the event again. Adding or removing any child records of an event is not considered as an update to the event record, and does not trigger the creation of an appointment. In addition, if your company administrator deselects the Display Events in Calendar setting in the company profile, then Oracle CRM On Demand no longer creates an associated event appointment corresponding to any new events. However, any existing event appointments created since the time your administrator selected the setting remains in Oracle CRM On

Demand, and Oracle CRM On Demand continues to synchronise those event appointments with the corresponding event updates to avoid data discrepancy between the event and the event appointment. However, Oracle CRM On Demand does not display the event appointment in the calendar because the administrator has deselected the setting.

When a user deletes a mapped event appointment, or the original event, Oracle CRM On Demand deletes both the mapped event appointment and the event itself, including the shared child records such as a shared user record, or a shared book record. Users can recover either record from the Deleted Items page for up to 30 days after deletion. Restoring one of these records restores the other corresponding record. For example, restoring an event restores the corresponding appointment for that event.

Users who are added to a synchronised appointment as a user are added to the event as a team member with read-only record access to the event, and users added to a synchronised event have read-only record access to the appointment. Oracle CRM On Demand evaluates the union of record access from the team and the default access profile attached to the user's role to determine the user's access to the record. User group members do not get added to an event as team members. Regardless of the channel from where a user gets added as an event team member, that user gets added to the appointment as a user.

Users who can access a synchronised appointment through a book have the same access to the event through the book, and if they can access a synchronised event through a book, then they have the same access to the appointment through the book. The event appointment is not displayed in the calendar of a user who gets access through a book, however the user gets access to the event appointment record in lists of appointments. If there is a workflow on an event with a Book Assign action, then the book that is assigned to the event is also assigned to the synchronized appointment. The reverse is also true, that is, if there is a workflow on an activity with a Book Assign action, then the book that is assigned to the appointment is also assigned to the synchronised event.

Related Topics

See the following topics for related information:

- Managing Calendars and Activities (on page 185)

- Managing Events (on page 591)

- Deleting and Restoring Records (on page 161)

Activity Fields

Use the Task Edit page to add a task or update details for an existing task. Use the Appointment Edit page to add an appointment or update details for an existing appointment. Use the Call Edit page to update the details of an existing planned call. The Edit pages show the complete set of fields for a task or appointment.

TIP: You can also edit the activities on the Activities List page and on the Appointment, Task, and Call Detail pages. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields available on the Task and Appointment Edit page. For more information about the fields available on the Call Edit page, see Tracking Visits (Sales Calls) to Customers (on page 198).

NOTE: If the Activity record type is configured in mixed mode or book mode, then the Delegated Flag field must not be present on the appointment, task, and call detail page layouts, otherwise an error occurs when you try to save the appointment, task, or call.

Field	Description
Account	Account linked to this activity.
Appointment Reminder	The length of time before the appointment start time that a reminder about the appointment is to be sent. A reminder is sent to the appointment owner and to each user in the list of users on the appointment, if the Activity Notification field setting on the user's record and at company level allows activity reminders to be sent to the user. For information about the Activity Notification field, see Setting Your Default Calendar View (on page 217). For information about the content of the reminder that is sent to users, see About Activity Reminders (on page 189). If you leave the Appointment Reminder field blank, then no reminders are sent for the appointment. **NOTE:** If you change the specified length of time for the reminder for an existing appointment, then the change applies to the reminder for all users on the appointment. The Appointment Reminder field does not appear on the Appointment Detail page by default in the standard application, but your administrator can add the field to the page layout for your role.
Approval Status	The approval status of the record when the task is created. This field does not appear by default. Company administrators can add this field to the Activity page layout. Company administrators can use this field to assist in tracking record approvals for Partner Relationship Management. This field can be populated as part of a workflow. For more information on the Create Task workflow, see Creating Workflow Actions: Create Task. For more information on configuring Partner Relationship Management, see Oracle CRM On Demand for Partner Relationship Management Configuration Guide.
Call Result	The result for the activity type Birthday Call, Referral Call, or Review Call, such as No Reach, Appointment, Stay in Touch, or Dead File. When you enter a value in this field it becomes read-only.
Campaign	The campaign that is linked to this activity.
Comments	This field contains comments about the activity. It has a limit of 250 characters.
Completed Date	The date and time when the activity was completed. For tasks, this field is automatically populated when the Status field is set to Completed or the Mark as Completed button is clicked. For appointments, if the Completed Date is left blank, it is automatically set to the same value as the End Time field when the appointment is created and saved. If the Completed Date field is not configured as a read-only field, then

Field	Description
	you can enter a date in this field that is different from the end date for the appointment. However, if you later change the value in the End Time field, then the value in the Completed Date field is also automatically changed to the new value in the End Time field. Also, changing the date in the Completed Date field does not result in the Completed check box for the appointment being selected, or the Status field being set to Completed, even if the new date is in the past. The Completed Date field can never be left blank on appointments because Oracle CRM On Demand uses this field to determine which appointments to include in the Open Activities and Open Appointments lists that appear in several areas in Oracle CRM On Demand. If you clear the value from the Completed Date field on an appointment, then Oracle CRM On Demand automatically resets the field to the same value as the End Time field.
Completed	For tasks, this check box is automatically selected when the Status field on the task is set to Completed. For appointments, this check box is not selected automatically when the Status field on the appointment is set to Completed.
Primary Contact	Primary contact linked to this activity. For companies using the Group feature, this contact is the Primary Contact on the Calendar views.
Delegated By	The user who delegated the activity to another owner. If the Delegated By field is blank when you assign the activity to another owner, then your name automatically appears in the Delegated By field after the activity is reassigned. However, if the Delegated By field is already populated with the name of a user, then the field is not automatically updated when you reassign the activity. If necessary, you can manually update the field so that it shows your name or the name of any other user. Changes to the Delegated By field are not audited by default.
Description	Additional information about this activity. Limit of 16,350 characters.
Due Date	Date this task is due (applies only to tasks).
End Time	The date and time the appointment concludes (applies only to appointments). Defaults to today's date and 1:00 p.m. Oracle CRM On Demand automatically updates this field, using the start time and duration of the appointment. If you leave the Completed Date field on an appointment blank, then the Completed Date is automatically populated with the value from the End Time field. If you change the value in the End Time field, then the value in the Completed Date field is also automatically changed to the new value in the End Time field.
Lead	Lead linked to this activity.
Location	Place where the appointment takes place (applies only to appointments).
Opportunity	Opportunity linked to this activity.
Owner	The owner of the activity record. Depending on the record ownership mode that your company administrator sets

Field	Description
	up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Priority	The priority level, such as 1-High, 2-Medium, or 3-Low. The priority level applies only to tasks. The default value is 3-Low. If the Priority field is not a required field for tasks in your company, then you can create a task with a null value in the Priority field. However, if the Priority field is set to a non-null value when a task is created or updated, then you cannot later change the Priority field for that task to a null value, even if the Priority field is not a required field. **NOTE:** If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values.
Private	If the Private check box is selected, then the activity record is not visible by default to other users, even if the activity is linked to a record that is visible to others. However, the activity record might be visible to some users. Users who have the View Private Activities privilege and the Can Read All Records setting for the Activity record type enabled in their user role have visibility to all activities that are marked private, regardless of the owner of the activity. The View Private Activities privilege does not allow a user to update or delete an activity that is marked private and is owned by another user. Users who have the Delete Any Activity privilege and the Can Read All Records setting for the Activity record type enabled in their role can delete activities that they do not own or activities that are marked private. Typically, the Delete Any Activity and View Private Activities privileges are given to company administrators only.
Reject Reason	Indicates why an item was returned or rejected. This field does not appear by default. Company administrators can add this field to Activity page layout. Company administrators can use this field to assist in tracking record approvals for Partner Relationship Management. This field can be populated as part of a workflow. For more information on the Create Task workflow, see Creating Workflow Actions: Create Task. For more information on configuring Partner Relationship Management, see Oracle CRM On Demand for Partner Relationship Management Configuration Guide.
Service Request	Service request linked to this activity.

Field	Description
Start Time	Date and time the appointment starts (only applies to appointments). Defaults to today's date and 12:00 p.m.
Status	The status of the task or appointment, for example, Completed, Deferred, In Progress, Waiting For Someone Else, or Not Started. **NOTE:** Administrators can edit the Status picklist and add new values or update the existing values, if their role includes the *Customise Application - Edit Activity 'Status' Picklist* and *Customise Application* privileges. For information on customising picklist values, see Changing Picklist Values. **CAUTION:** Adding or editing the values that are available by default in the picklist for the Status field for the Activity record type might produce unwanted results for activity processing. Oracle CRM On Demand specifically looks for the Completed, Submitting, Submitted, or Planned field values when it processes activities. If your company deactivates these status values and replaces them with custom values, then the activity processing in the Oracle CRM On Demand application will not work as documented. Consequently, changing the Status field picklist values for the Activity record type is not recommended.
Subject	Title or short description of this activity.
Sub Type	The object type of the approval. This field does not appear by default. Company administrators can add this field to Activity page layout. Company administrators can use this field to assist in tracking record approvals for Partner Relationship Management. This field can be populated as part of a workflow. For more information on the Create Task workflow, see Creating Workflow Actions: Create Task. For more information on configuring Partner Relationship Management, see Oracle CRM On Demand for Partner Relationship Management Configuration Guide.
Task Reminder	The date and time at which a reminder about the task is to be sent. A reminder is sent to the task owner and to each user in the list of users on the task, if the Activity Notification field on the user's record and at company level allows activity reminders to be sent to the user. For information about the Activity Notification field, see Setting Your Default Calendar View (on page 217). For information about the content of the reminder that is sent to users, see About Activity Reminders (on page 189). If you leave the Task Reminder field blank, then no reminders are sent for the task. **NOTE:** If you change the date or time for the reminder for an existing task, then the change applies to the reminder for all users on the task. The Task Reminder field does not appear on the Task Detail page by default in the standard application, but your administrator can add the field to the page layout for your role. **NOTE:** If you change the due date for a task, the Task Reminder field is not updated automatically. If you want to change the date and time for the task reminder, then you must update this field manually.
Type	For both tasks and appointments, this field refers to a category, such as Approval, Birthday Call, Call, Correspondence, Demonstration, Email, Event,

Field	Description
	Fax, Lunch, Meeting, Personal, Presentation, Other, Referral Call, Review Call, or To Do.
Activity	This read-only picklist field refers to the type of activity, namely Task, Appointment, Automated Task, COD Activity, or Smart Call.
	NOTE: This field does not appear on default Activity page layouts, such as Task page layouts, or Appointment page layouts, and so on.

3 Marketing

Oracle CRM On Demand provides the following record types for marketing information:

- **Campaigns**. Use these pages to manage marketing campaigns and to generate qualified leads and opportunities.

- **Leads**. Use these pages to track leads for new sales opportunities and to automate the lead conversion process.

Managing Marketing

To manage marketing, perform the following processes.

1 Process of Handling Campaigns (on page 229).

2 Process of Handling Leads (on page 230).

Process of Handling Campaigns

To handle campaigns, perform the following tasks:

1 Create a campaign record, see Creating Records (on page 51) and Campaign Fields (on page 236).

2 Assign campaign recipients, see Targeting Contacts for Campaigns (on page 234).

3 Execute the campaign.

4 Track campaign responses, see Recording Responses to Campaigns (on page 235).

5 Measure campaign effectiveness, see Measuring Campaign Effectiveness (on page 236).

6 Associate leads with the campaign. If the campaign generates leads, you must associate the new leads with the campaign from which they came, see Creating Records (on page 51) and Leads Fields (on page 256).

Process of Handling Leads

To handle leads, perform the following tasks:

1 Set up lead assignment rules, see About Assignment Rules and Setting Up Assignment Rules.

2 Set up lead conversion rules, see Leads (on page 238) and Mapping Additional Fields During Lead Conversion.

3 Set up lead conversion layouts, see Creating Lead Conversion Layouts.

4 Create lead qualification scripts, see Using Lead Qualification Scripts (on page 248).

5 Qualify the lead, see Qualifying Leads (on page 248).

6 Convert or reject the lead.

You can convert leads to account, contact, deal registration, or opportunity records, see Converting Leads to Accounts, Contacts, Deal Registrations, or Opportunities (on page 250). If you decide that a lead is not valuable, you can remove it from the lead management process, see Rejecting Leads (on page 255).

Campaigns

Use the Campaign pages to create, update, and track campaigns. A *campaign* is the vehicle or project in which you convey a marketing message to one or more groups of people, including existing and potential customers. Typically, campaigns deliver a promotional offer to different channels of communication to retain current customers or to acquire new customers. The goal is to generate additional interest in company products and services.

Using campaigns enables you to do the following:

■ Store campaign information such as budgeted costs compared with actual costs, targeted leads, and marketing material (for example, brochures and artwork) in one place.

■ Share views of campaigns with the marketing team and share consistent campaign information with your sales team from the same location in real time.

■ See your campaign results by viewing leads and opportunities, which are generated for each campaign.

■ Use prebuilt reports to measure the results and determine the return on investment of your campaign activities in real time.

■ Make historical comparisons between current and past campaigns to identify trends.

Sales and marketing managers can import leads and link them to an existing campaign. Lead information must first be formatted in a comma-separated value (.csv) file.

Campaigns, Leads, Opportunities, and Contacts

During a campaign, you can generate multiple leads that are linked to the campaign. If you convert some of those leads to new opportunities, contacts, or accounts, the link to the campaign is carried over from the originating leads to the converted opportunities, contacts, and accounts. For example, Campaign A creates 100 leads, L1 through L100. You link each of these leads to Campaign A. Leads L1 through L90 never show potential for producing revenue. Leads L91 through L100 do show revenue potential, so you convert them to opportunities O1 through O10. Each of these opportunities is automatically linked to Campaign A by way of its originating lead. Several months later, you want to review the effectiveness of Campaign A. You view the Campaign A record and see that there are 100 leads and 10 opportunities linked to it. You can compare these results to past campaigns or to your expectations for this campaign, and make adjustments accordingly.

NOTE: If your company administrator adds custom fields for leads, those fields are not carried over to the opportunity records when the lead is converted to an opportunity or contact. An exception occurs if your company administrator sets up additional mapping through the Lead Conversion Mapping feature. For more information about mapping lead fields, see Mapping Additional Fields During Lead Conversion.

Working with the Campaign Homepage

The Campaign Homepage is the starting point for managing campaigns.

NOTE: Your company administrator can customise the layout of your Campaign Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Campaign

You can create a campaign by clicking the New button in the My Recently Viewed Campaigns section. For more information, see Creating Records (on page 51) and Campaign Fields (on page 236).

Working with Campaign Lists

The Campaign Lists section shows a number of filtered lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for campaigns.

Campaign List	Filter
All Active Campaigns	Campaigns where the Status field is set to Active
All Completed Campaigns	Campaigns where the Status field is set to Completed
All Planned Campaigns	Campaigns where the Status field is set to Planned
Recently Created Campaigns	All campaigns, sorted by the created date, with the most recently created campaign at the top of the list

Campaign List	Filter
Recently Modified Campaigns	All campaigns, sorted by the modified date, with the most recently modified campaign at the top of the list
All Campaigns	None. The list shows all campaigns for your company, sorted by Campaign Name, in ascending order.
My Recently Modified Campaigns	All campaigns owned by you. The list is sorted by the modified date, with the most recently modified campaign at the top of the list.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Viewed Campaigns

The My Recently Viewed Campaigns section shows the campaigns that you viewed most recently.

Working with Campaign Tasks

The Campaign Tasks section shows the tasks assigned to you, sorted by the due date and then by priority. You or your manager set the due date and priority. The task priority, such as 1-High, 2-Medium, or 3-Low, is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority.

NOTE: If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values.

- To review a task, click the Subject link.

- To review the campaign with which the task is associated, click the campaign name.

- To expand the list of tasks, click Show Full List.

Viewing Active Campaigns

The Active Campaigns section shows a list of campaigns that is currently running.

■ To view an active campaign, click the Campaign Name field.

■ To expand the list, click Show Full List.

Report Sections

One or more report sections might be shown on your Campaign Homepage. Your company administrator can specify which report sections are shown on the page. In the standard edition of Oracle CRM On Demand, the Active Campaign Status section is shown.

Using Reports to Measure Campaign Effectiveness

One or more report sections might be shown on your Campaign Homepage (your company administrator can specify which report sections are shown on the page). In the standard application, the Active Campaign Status section is shown, which displays an analysis of all active campaigns. For more information about using the Active Campaign Status section, see Measuring Campaign Effectiveness (on page 236).

Adding Sections to Your Campaign Homepage

If your user role includes the Personalise Homepages privilege, you can add additional sections to your Campaign Homepage, depending on which sections your company administrator has made available for display on your Campaign Homepage.

To add sections to your Campaign Homepage

1 On the Campaign Homepage, click Edit Layout.

2 On the Campaign Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Managing Campaigns

To manage campaigns, do the following tasks:

■ Targeting Contacts for Campaigns (on page 234)

■ Recording Responses to Campaigns (on page 235)

■ Closing Campaigns (on page 235)

■ Measuring Campaign Effectiveness (on page 236)

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

- Linking Records to Your Selected Record (on page 104)

- Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

- Campaign Fields (on page 236)

- Working with the Campaign Homepage (on page 231)

- Reports (on page 907)

- Importing Your Data

Targeting Contacts for Campaigns

You can select contacts that you want to target for a campaign.

NOTE: If your company uses Segmentation Wizard, a downloadable application that works between Oracle CRM On Demand and Excel, you can build target segments that filter records according to criteria from a number of record types. For information about how to download and use Segmentation Wizard, see Using Segmentation Wizard (on page 901).

To target contacts for a campaign

1 Select the campaign.

For instructions on selecting campaigns, see Finding Records (on page 68).

2 On the Campaign Detail page, scroll down to the Recipients section and do the following:

NOTE: If the Recipients section is not visible on the Campaign Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Recipients section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

- To target contacts one by one, click Add.

- To remove the contact, click the Remove link in the record row. This disassociates the records without deleting any records.

3 Save the record.

To import contacts from a file, see Importing Your Data.

Recording Responses to Campaigns

When you want to record the response to a campaign, such as the fact that a recipient attended an event, you can track this in the campaign recipient section.

To record a response to a campaign

1   Select the campaign.

    For instructions on selecting campaigns, see Finding Records (on page 68).

    Note: If the Recipients section does not appear in the Campaign Detail page, click Page Layout to add it.

2   On the Campaign Detail page, scroll down to the Recipients section and click Edit for the contact whose response you want to record.

3   On the Campaign Response Edit page, fill in the information.

Field	Description
Delivery Status	The standard values are Pending, Sent, Soft Bounce, Hard Bounce, Unknown Bounce, Received and Opened. However, your company administrator can rename the options in this drop-down list.
Response Status	The standard values are Click-thru, RSVP - Will Attend, RSVP - Will Not Attend, Attended, Converted to Lead, Requested More Info, Opt-in to List, Opt-out from List, Global Opt-in, Global Opt-out and Message Opened. However, your company administrator can customise the options in this drop-down list.

4   Save the record.

Closing Campaigns

You can change the campaign status to indicate it is completed.

To close a campaign

1   On the Campaign List page, click in the Status field.

2   Select the Completed status from the drop-down list.

3   Click the green check mark icon in the Status field to save the record.

Measuring Campaign Effectiveness

The Active Campaign Status section of the Campaign Homepage shows an analysis of all active campaigns. You can use this information to determine the effectiveness of your campaigns.

To view information about the effectiveness of your campaigns

◼ In this section of the Campaign Homepage, do the following:

   ◼ Place your pointer on the chart to see specific information.

   ◼ Click a segment to review a detailed report.

   ◼ Change the categories in the lists to view the same data from a different perspective.

      For example, you can view the analysis of campaigns by the ROI (return on investment), lead-conversion rate, or the cost for each lead.

Campaign Fields

Use the Campaign Edit page to add a campaign or update details for an existing campaign. The Campaign Edit page shows the complete set of fields for a campaign.

TIP: You can also edit campaigns on the Campaign List page and the Campaign Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information that you see on-screen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Campaign Information	
Source Code	Campaign identifier code. Ensure that the code you enter is unique. This field has a maximum of 30 characters.
Campaign Name	Descriptive name of the campaign. This field has a maximum of 100 characters.
Campaign Type	Type of campaign, such as Advertisement, Direct Mail, Email, Event - Other, Event - Seminar, Event - Trade Show, List - Purchased, List - Rented, Other, Referral - Employee, Referral - External or Web Site.
Objective	Description of the campaign's objective, such as "To increase sales by 10%."
Audience	Target audience of the campaign.
Offer	Description of the product or service that the campaign is offering.

Field	Description
Status	Campaign status, such as: ■ **Active.** Start date is in the past and end date is in the future ■ **Completed.** Start and end dates are in the past. ■ **Planned.** Start and end dates are in the future. ■ **Scheduled.** You can manually set this status to indicate that the campaign is ready and is now set to execute at a particular date and time. ■ **Contact Support.** You can use this status to indicate any issues with the campaign where Oracle Support has to be contacted. Email campaigns set up using Oracle Email Marketing On Demand (EMOD) before it was discontinued used to be updated with this status to indicate that there was a problem with the campaign. You must set the status. The system does not automatically update it when the campaign is launched.
Start Date	Date and time that the campaign starts. Defaults to the current date and time. You can use the calendar controls to change this date.
End Date	Date and time that the campaign is scheduled to be completed. Defaults to the current date and time. You can use the calendar controls to change this date.
Campaign Currency	Enter the code (such as USD) for the currency used for all revenue fields.
Campaign Plan Information	
Revenue Target	Revenue expected to be generated by the campaign.
Leads Targeted (#)	Number of prospects that the campaign targets.
Budgeted Cost	Amount that your company budgets for this campaign.
Actual Cost	Amount that your company is spending on this campaign.
Additional Information	
Owner	The alias of the owner of the campaign record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. The value in the Owner field affects which records are included in reports that you or your managers run from Reports and Dashboard pages. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book

Field	Description
	field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Description	Description of the campaign. This field has a limit of 16,350 characters.

Leads

Use the Leads pages to create, update, and evaluate leads. A *lead* is a person who has indicated an interest in your products or services.

You can enter leads manually, or they can be assigned to you. You can follow up assigned leads to determine if they will eventually generate revenue for the company. Creating a lead record is a quick way to gather new customer information. In one record you can enter details about the company, the person, and the business interest, instead of creating four different records for an account, a contact, a deal registration, and an opportunity.

A lead moves through the lead management process in the following sequence of stages: evaluating, qualifying, and converting to an opportunity or deal registration. Instead of qualifying a lead, you might remove it by archiving it. Instead of converting a qualified lead to an opportunity or deal registration, you might reject it. The rest of this topic explains the stages in more detail.

Evaluating Leads

During evaluation, the person evaluating the lead performs a number of ongoing activities:

- Calls, emails or visits the contact to exchange information.

- Updates specific information about the lead with more accurate and recently discovered information.

- Creates, tracks and completes activities regarding the lead.

- Logs notes regarding the interaction.

- (Optional but recommended) Links the lead to an account and a contact, which has the following advantages:

  - The user assigned to the account or contact (who may or may not also be the user assigned to the lead) can view the lead during the evaluation process, because it will appear in the Account and Contact pages.

  - The lead owner can access additional information about the account or contact by clicking a link.

  - The lead owner can enter more details than can typically be stored with a lead, such as additional contacts at the account, ship to address and so on.

- If the lead is converted to an opportunity or deal registration, the existing account and contact links can speed up that process.

Qualifying Leads

The qualification process helps the evaluator to gather enough information to determine which leads to pursue further. When the evaluator determines that a lead has some potential for generating revenue, the evaluator qualifies the lead. The system then checks to ensure that certain critical fields contain data. If the criteria have been met, the lead is marked as qualified and can be viewed by the sales person as a recently qualified lead.

Qualifying leads accurately helps your company to spend more time working on high-potential business deals. Company administrators can set up Lead Qualification scripts to help evaluators to qualify leads accurately and consistently. (For information on setting up assessment scripts, see Setting Up Assessment Scripts).

Archiving Leads

Alternatively, if the lead is considered to have no value to the company, then the evaluator can archive the lead. The system then removes the lead from the lead management process.

TIP: To sort archived leads, create a new list called Archived Leads. For more information on creating lists, see Creating and Refining Lists (on page 118).

Converting Leads to Opportunities or Deal Registrations

Leads can be converted to contacts, and optionally to accounts, opportunities, and deal registrations using the Convert Lead page. The Convert Lead page contains lead conversion options as specified in the Lead Conversion layout that is applicable to the user role. If a lead has enough potential value, the evaluator can convert it to an opportunity or a deal registration, so long as a lead conversion layout has all lead conversion options enabled. The system prompts the evaluator for an account to link to the lead, a contact at that account to link to the lead, and an opportunity or deal registration to link to the lead.

Oracle CRM On Demand then creates a new opportunity or deal registration and removes the lead from active evaluation (although it can still be viewed if desired).

If your administrator adds the relevant options to the lead conversion layout, then the evaluator can also do the following when converting a lead:

- Copy the members of the lead team to the team on the account, contact, and opportunity that are created or linked to the lead during the conversion process.

    The team role and access level for the lead team members on an account, contact, or opportunity are determined as follows:

    - **When an existing record is used.** If the evaluator selects the option to link the lead to an existing account or contact instead of creating a new one, then the evaluator must specify the record access level that will be granted to the lead owner in the team on the linked account or contact. All other members of the lead team are given the record access level on the linked record that they have on the lead record, unless they are already members of the team on the linked record, in which case their access level on that record remains unchanged. If any member of the team, including the lead owner, has a team role on the lead, then the user is given the same role on the linked record, unless the user already has a team role on the linked record, in which case the user's role on the linked record remains unchanged.

■ **When a new record is created.** If the evaluator selects the option to create a new account, contact, or opportunity, then the owner of the lead becomes the owner of the new record and is given the Owner level of access to the record. Other members of the lead team are given the record access level on the new record that they have on the lead record. If any member of the team, including the lead owner, has a team role on the lead, then the user is given the same role on the new record.

NOTE: If the team role that is assigned to a team member on the lead is not available for the record type of the linked record, then the Team Role field is left blank for that user on the linked record.

■ Link the lead's associated custom object records to the account, contact, and opportunity that are created or linked to the lead during the conversion process.

What Happens During Conversion

In the standard application, some information from the lead record is carried over to the relevant fields in the account, contact, opportunity, and deal registration records that are created or linked to the lead during the conversion process. The following table shows an example of how the fields can be mapped among the records. Some of the fields shown in this table are mapped by default, while other fields are not. Your company administrator can determine how the lead fields are mapped for your company. For information about mapping fields for lead conversion, see Mapping Additional Fields During Lead Conversion.

Lead	Account	Opportunity	Contact	Deal Registration
Address	Billing Address	Not applicable	Contact Address	Deal Address
Annual Revenues	Annual Revenues	Not applicable	Not applicable	Not applicable
Approximate Income	Not applicable	Not applicable	Total Income	Not applicable
Associated Company	Not applicable	Not applicable	Not applicable	Associated Company
Associated Contact	Not applicable	Not applicable	Not applicable	Associated Contact
Campaign	Source Campaign **NOTE:** If the account is created through the lead conversion process, this field is automatically populated from the Campaign field on the lead record. If the account is created by a user, the user can enter the information in	Source Campaign **NOTE:** If the opportunity is created through the lead conversion process, this field is automatically populated from the Campaign field on the lead record. If the opportunity is created by a user, the user can enter the information in	Source Campaign **NOTE:** If the contact is created through the lead conversion process, this field is automatically populated from the Campaign field on the lead record. If the contact is created by a user, the user can enter the information in	Not applicable

Lead	Account	Opportunity	Contact	Deal Registration
	this field.	this field.	this field.	
Cellular Phone #	Not applicable	Not applicable	Cellular Phone #	Mobile Phone
City	Invoicing City Shipping City	Not applicable	Primary City	City (of Deal Address)
Company	Account Name	Account	Account	Company Name
Country	Invoicing Country Shipping Country	Not applicable	Primary Country	Country
Date of Birth	Not applicable	Not applicable	Date of Birth	Not applicable
Description	Not applicable	Description	Not applicable	Justification
Email	Not applicable	Not applicable	Email	Email
Estimated Close Date	Not applicable	Close Date	Not applicable	Close Date
First Name	Not applicable	Not applicable	First Name	Not applicable
Industry	Industry	Not applicable	Not applicable	Not applicable
Job Title	Not applicable	Not applicable	Job Title	Not applicable
Last Name	Not applicable	Not applicable	Last Name	Not applicable
Lead Currency	Not applicable	Not applicable	Not applicable	Deal Currency
Lead Owner	Not applicable	Not applicable	Not applicable	Not applicable
Lead Type	Account Type	Not applicable	Contact Type	Not applicable
Mr/Ms	Not applicable	Not applicable	Mr./Ms	Not applicable
Never Email	Not applicable	Not applicable	Never Email	Not applicable
Next Step	Not applicable	Next Step	Not applicable	Next Step
Number of Employees	Number of Employees	Not applicable	Not applicable	Not applicable
Originating Partner	Not applicable	Not applicable	Not applicable	Originating Partner
Potential Revenue	Not applicable	Revenue	Not applicable	Deal Size
Primary Phone #	Not applicable	Not applicable	Work Phone #	Telephone #
Principal Partner	Not applicable	Not applicable	Not applicable	Principal Partner
Product Interest	Not applicable	Opportunity Name becomes:	Not applicable	Product Interest

Lead	Account	Opportunity	Contact	Deal Registration
		Product Interest (Contact Full Name)		
Profession	Not applicable	Not applicable	Profession	Not applicable
Qualified Date	Not applicable	Not applicable	Qualified Date	Not applicable
Rating	Not applicable	Not applicable	Not applicable	Not applicable
Referred by	Not applicable	Not applicable	Referred by	Not applicable
Source	Not applicable	Lead Source	Lead Source	Not applicable
State/Province	Invoicing County/Region Shipping County/Region	Not applicable	Primary State/Province	State (of Deal Address)
Website	Web Site	Not applicable	Not applicable	Not applicable
Work Fax #	Not applicable	Not applicable	Work Fax #	Not applicable
Zip/Postal Code	Invoicing Zip Code Shipping Post Code	Not applicable	Primary Post Code	Zip (of Deal Address)

In addition, some fields show different values as a result of the lead conversion process. The following table lists the new values.

This record/field	Changes to this value
Lead record	
Status	Converted
Account record	
Owner	User converting the lead. See the following section, Ownership of Related Lead Records After Conversion.
Opportunity record	
Status	Pending
Sales Stage	Building Vision
Probability	50%
Owner	User converting the lead. See the following section, Ownership of Related Lead Records After Conversion.
Contact record	
Owner	User converting the lead. See the following section, Ownership of Related Lead Records After Conversion.

This record/field	Changes to this value
Deal Registration Record	
Name	Product Interest on the lead. You can override this field.
Type	Standard
Submission Status	Not Submitted.

Ownership of Related Lead Records After Conversion

If you have populated the Sales Person field, this person becomes the owner of all related records when the lead is converted. If this field is not populated, the user who converts the lead becomes the owner of all related records. However, the company administrator can change this behaviour using the Lead Conversion Mapping feature. For more information, see Mapping Additional Fields During Lead Conversion.

Rejecting Qualified Leads

Qualified leads can also be rejected. This is typically done in organisations where the person or group evaluating leads is different from the sales people who take qualified leads and convert them into revenue. In those organisations, the sales person assigned to a qualified lead may determine that the lead is not as valuable as the evaluator had indicated.

When rejecting a lead, the sales person must specify a Reject Code for the rejection and can optionally specify the Reject Reason as well. If the Reject Code selected is Other, the Reject Reason becomes a required field. The system records that a rejection occurred, who rejected it and why it was rejected.

The sales person may also choose to have the lead reassigned as part of the rejection. Depending on the company's policies, the lead may be reassigned to a manager for follow-up, or it may go back to the original evaluator for further assessment.

Working with the Leads Homepage

The Leads Homepage is the starting point for managing leads.

NOTE: Your company administrator can customise the layout of your Leads Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Lead

You can create a lead by clicking the New button in the My Recently Viewed Leads section. For more information, see Creating Records (on page 51) and Leads Fields (on page 256).

Working with Leads Lists

The Lead Lists section shows a number of filtered lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for leads.

Leads List	Filter
All Leads	None
All Converted Leads	Displays leads where the Status field is set to Converted
All Leads Being Qualified	Displays leads where the Status field is set to Qualifying
All Qualified Leads	Displays leads where the Status field is set to Qualified
Recently Created Leads	Displays all leads, sorted by the created date
Recently Modified Leads	Displays all leads, sorted by the modified date
All Rejected Leads	Displays leads where the Status field is set to Rejected
My Leads	Displays leads, sorted by the created date, that meet one of the following conditions: ■ The Sales Person field is set to your user name, and the Status field is set to Qualifying. ■ The Lead Owner field is set to your user name, the Sales Person field is empty, and the Status field is set to Qualifying.
My New Leads	Displays leads, sorted by the created date, that meet one of the following conditions: ■ The Sales Person field is set to your user name, and the Status field is set to Qualified. ■ The Lead Owner field is set to your user name, the Sales Person field is set to a user name other than your user name, and the Status field is set to Qualifying.
My Recently Assigned Leads	Displays leads that were assigned to you by the assignment manager. The list is sorted by the last assignment completion date, with the lead that was most recently assigned to you by the assignment manager at the top of the list. You can also see this list in the My Recently Assigned Leads section of the Leads Homepage, if that section is available in the Leads Homepage layout for your role. **NOTE:** When a lead is assigned to you by the assignment manager, an email is automatically sent to you. When you click the URL in the email and then sign in to Oracle CRM On Demand, you are redirected to the My Recently Assigned Leads list automatically.

Leads List	Filter
My Recently Created Leads	Displays all leads that you own. The list is sorted by the created date, with the most recently created lead at the top of the list.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Viewed Leads

The My Recently Viewed Leads section shows the leads that you viewed most recently.

Working with Lead Tasks

The My Open Lead Related Tasks section shows the tasks assigned to you, sorted by due date and then by priority. You or your manager set the due date and priority. The task priority, such as 1-High, 2-Medium, or 3-Low, is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority.

NOTE: If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values.

■ To review a task, click the Subject link.

■ To review the lead with which the task is associated, click the lead name.

■ To expand the list of tasks, click Show Full List.

Viewing Qualified Leads

The Qualified Leads section shows a list of qualified leads. The Full Name field is a link that opens the lead record.

■ To open the lead record, click the Full Name field.

■ To expand the list, click Show Full List.

Using Reports to Analyse Lead Follow-up

One or more report sections might be shown on your Leads Homepage. Your company administrator can specify which report sections are shown on the page. In the standard edition of Oracle CRM On Demand, the Lead Follow-up Analysis section is shown, which displays the progress made towards qualifying leads in the last 90 days. For information about using the Lead Follow-up Analysis section, see Analysing Lead Follow-up (on page 256).

Adding Sections to Your Leads Homepage

If your user role includes the Personalise Homepages privilege, you can add additional sections to your Leads Homepage, depending on which sections your company administrator has made available for display on your Leads Homepage.

To add sections to your Leads Homepage

1 On the Leads Homepage, click Edit Layout.

2 On the Lead Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Managing Leads

To manage leads, do the following tasks:

- Reassigning Leads (on page 247)
- Qualifying Leads (on page 248)
- Using Lead Qualification Scripts (on page 248)
- Archiving Leads (on page 249)
- Converting Leads to Accounts, Contacts, Deal Registrations, or Opportunities (on page 250)
- Rejecting Leads (on page 255)
- Analyzing Lead Follow-up (see "Analysing Lead Follow-up" on page 256)
- Sending Marketing Emails Using Oracle Eloqua Engage (on page 309)

NOTE: If you are using Oracle CRM On Demand Financial Services Edition and taking advantage of the Referrals feature, new leads are created when you link new referrals to contacts.

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 103)
- Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Reassigning Leads

If your access levels permit you to do so, you can manually reassign a lead by changing the owner or primary custom book on the lead record.

NOTE: Depending on the record ownership mode that your company administrator configures for the Lead record type, you can assign a lead record to an owner or to a primary custom book; however, you cannot assign a lead record to both an owner and a primary custom book. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

If your company uses the assignment manager and the Lead record type is configured for the user mode or mixed mode of record ownership, then you can also reassign a lead to a new owner by selecting the Reassign Owner check box on the request.

To reassign a lead

1 Select the lead that you want to reassign.

   For instructions on selecting leads, see Finding Records (on page 68).

2 On the Lead Detail page, click Edit.

3 On the Lead Edit page, perform one of the following:

   ■ In the Owner Full Name field or the Book field, click the Lookup icon, and then select another user or book in the Lookup window.

   ■ Select the Reassign Owner check box to trigger the assignment manager to reassign the lead.

   NOTE: The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. The assignment manager cannot reassign records if the record type is configured in book mode. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

4 Save your changes.

NOTE: The processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned and current system load.

Qualifying Leads

If you determine that a lead has potential to become an opportunity, you can qualify the lead. Normally, you select a rating for the lead according to a scale set up by your company administrator.

NOTE: Your company administrator might have set up assessment scripts to help you to evaluate leads for qualification. For more information on using Lead Qualification scripts, see Using Lead Qualification Scripts (on page 248).

Before you begin. To perform this procedure, your user role must include the Qualify Leads privilege.

To qualify a lead

1   Select the lead.

    For instructions on selecting leads, see Finding Records (on page 68).

2   On the Lead Detail page, make sure that the necessary fields are populated.

    For information about the fields that must be populated before a lead can be qualified, see Required Fields for Lead Qualification (on page 249).

3   Click Mark as Qualified.

    The system verifies that the critical fields contain data. If the criteria are met, the lead Status field value changes to Qualified.

    NOTE: If you receive an error message after clicking Mark as Qualified, verify that the Qualified Date field has not been customised with a read-only value.

Using Lead Qualification Scripts

Your company administrator might have set up assessment scripts to help you to evaluate leads for qualification. A Lead Qualification script consists of a series of questions that you use to collect customer data. Your responses are scored, assigned a weighting and compared with a specified threshold to determine the appropriate outcome or course of action.

Before you begin. To use assessment scripts, your user role must be set up to allow access to the assessment records. For more information about the required settings, see About Assessment Scripts.

NOTE: For information about the fields that must be populated before a lead can be qualified, see Required Fields for Lead Qualification (on page 249).

To use a lead qualification script

1   Select the lead.

    For more information on selecting leads, see Finding Records (on page 68).

2   On the Lead Detail page, scroll down to the Lead Qualification Scripts section and click Add.

NOTE: If the Lead Qualification Scripts section is not shown, click the Edit Layout link in the upper-right corner of the page, and add the Lead Qualification Scripts section to your page layout. This section is only available if the company administrator has set up a Lead Qualification script.

3 In the Lookup window, search for the appropriate script, and click Select. You can use the filter fields at the top of the Lookup window to filter the list of scripts.

4 In the Lead Qualification Scripts window, select the answer for each script question and click Save.

The Lead Detail page appears again. Depending on the outcome of the script, some of the fields on the record might have been updated automatically.

Required Fields for Lead Qualification

For the status of a lead to be set to Qualified, certain fields on the lead are always required and other fields might also be required, as follows:

■ The First Name and Last Name fields are always required.

■ In the standard application, the following fields are also required: Owner Full Name, Rating, and Sales Person. This is true both in the case where you qualify a lead directly and also where you use a lead qualification script. If a lead qualification script attempts to set the Status field on a lead to Qualified, and if one or more of the required fields is not populated, then an error message is displayed and the script assumes the lead has failed to meet the threshold for qualification that is defined on the script. The script then sets the Status field according to the results defined on the script for failing to meet the threshold.

Your administrator can change the behavior so that the Owner Full Name, Rating, and Sales Person fields are not required for lead qualification by deselecting the following setting on the company profile: Enable Owner Full Name, Rating and Sales Person Are Required to Qualify a Lead.

■ Your company can optionally create a business process to specify that one or more fields must be populated or must have a certain value before the status of a lead can be set to Qualified. To do this, your administrator sets up a business process for the Lead record type, with a transition state for the Qualified status value. For information about setting up business processes, see Process Administration.

Archiving Leads

Instead of qualifying a lead, you can specify that it is not worth pursuing and remove it from the assessment process. Archiving a lead does not delete it, but retains the lead in the database with a status of Archived.

Before you begin. To perform this procedure, your user role must include the Archive Leads privilege.

To archive a lead

1 Select the lead you want to archive.

For instructions on selecting leads, see Finding Records (on page 68).

2 On the Lead Detail page, click Archive.

The lead Status field changes to Archived.

Converting Leads to Accounts, Contacts, Deal Registrations, or Opportunities

If your user role has the appropriate set-up, you can create account, contact, deal registration, and opportunity records, or copy lead information to existing records by converting the lead record. Depending on your company's settings, the new opportunity record can include information that affects revenue calculations. For further information about the conversion process and its impact on fields and values, see What Happens During Conversion in Leads (on page 238).

NOTE: Normally, you convert leads to opportunities that have previously been qualified. See Qualifying Leads (on page 248).

The procedure in this section describes the steps for the following two scenarios:

Scenario 1. You have new leads resulting from a campaign that your company conducted. As part of each lead record, you have a person's name along with their company name. You now want to create a new contact, a new account and potentially, a new opportunity record using information from the lead.

Scenario 2. You run a campaign targeted at existing accounts and contacts. Some leads were generated that you now want to convert to opportunities.

Before you begin. To perform this procedure, your user role and access profile settings must be set up as described in Access Profile and Role Settings for Converting Leads (on page 252). The Convert Lead page shows only the conversion options that are available to your user role, according to the lead conversion layout that has been selected for the role. If a lead conversion layout has not been selected for the role, the default lead conversion layout applies.

To convert a lead to an account, contact, deal registration, or opportunity

1 Select the lead that you want to convert.

   For instructions on selecting leads, see Finding Records (on page 68).

2 On the Lead Detail page, click Convert.

3 On the Convert Lead page, perform one of the following:

   ■ To create new account and contact records for this lead (Scenario 1), select the Auto-create New Account and Auto-create New Contact options.

      In the Account section, the Company field for the lead appears in the Account Name field by default. In the Contact section, the First Name and Last Name for the lead appear by default.

   ■ To create a new opportunity and link the opportunity to an existing account and contact, select the Use Existing Account and Use Existing Contact options.

      If the lead record has an associated account, this account appears in the Associated Account field. If the lead record has an associated contact, this contact appears in the Associated Contact field.

   ■ To link the lead to a different account or contact, click the Lookup icon next to the Associated Account or Associated Contact fields and select another account and contact. Ensure that the proper names

appear in the Associated Account and Associated Contact fields and that the Use Existing Account and Use Existing Contact option buttons are selected.

4 (Optional) To convert the lead to an opportunity, select the Auto-Create New Opportunity option and complete the fields.

NOTE: The first name and last name from the lead record appear in the Associated Opportunity field by default, and you can edit this field. In the standard application, the Revenue, Close Date, Next Step, and Description fields also appear in the Opportunity section of the Convert Lead page. You can edit these fields here, and their values are carried into the opportunity record. Depending on how your administrator sets up the layout for the Convert Lead page, you might see different fields.

5 If you want to copy the lead team to the team on the account, contact, or opportunity, do the following:

  a Make sure that the Copy Lead Team check box in the appropriate section of the page is selected. For example, if you want to copy the lead team to the new opportunity, then make sure the Copy Lead Team check box in the Opportunity section of the page is selected.

  b If you selected the Use Existing Account option, and if the Copy Lead Team check box is selected in the Account section of the page, then select the record access level that you want to grant to the lead owner in the account team.

  c If you selected the Use Existing Contact option, and if the Copy Lead Team check box is selected in the Contact section of the page, then select the record access level that you want to grant to the lead owner in the contact team.

  NOTE: Your administrator can enable team inheritance for the Contact and Opportunity record types by selecting the Enable Parent Team Inheritance for Contact check box and the Enable Parent Team Inheritance for Opportunity check box on the Company Profile page. If team inheritance is enabled for the Contact or Opportunity record type, then the contact or opportunity team automatically inherits the team members of the account that is linked to the lead during the lead conversion, even if the Copy Lead Team check box is not selected in the Contact or Opportunity section of the Convert Lead page.

6 If you do not want to copy the lead team to the team on the account, contact, or opportunity, then deselect the Copy Lead Team check box in the appropriate section of the page. For example, if you do not want to copy the lead team to the new opportunity, then deselect the Copy Lead Team check box in the Opportunity section of the page.

7 To associate the lead's associated records of a given custom object record type with the account, contact, or opportunity, select the check box to associate that custom object record type in the appropriate section of the page.

NOTE: Your administrator determines which Custom Object record types can be associated with the records, by making the relevant options available when setting up the layout for the Convert Lead page.

8 (Optional) To convert the lead to a deal registration, select the Auto-Create Deal Registration option and complete the fields.

NOTE: The values of the Product Interest field and the Principal Partner Account field from the lead record appear in the Deal Registration Name field and Principal Partner Account field respectively by default, and you can edit these fields. In the standard application, the Revenue, Close Date, Next

Step, and Description fields also appear in the Deal Registration section of the Convert Lead page. You can edit these fields here, and their values are carried into the deal registration record. Depending on how your administrator sets up the layout for the Convert Lead page, you might see different fields.

9 To convert the lead, click Save.

When the conversion is completed:

■ The Lead Detail page appears again with these values, most of which are based on the selections that you made on the Convert Lead page:

■ The Status field for the lead is Converted.

■ The Associated Account and Associated Contact field values are the same as those that were on the Convert Lead page.

■ If you converted the lead to an opportunity, the Associated Opportunity field value is the same as the new opportunity name that was on the Convert Lead page.

■ If you converted the lead to an opportunity, the new opportunity record created from the conversion process has the converted lead linked to the opportunity record.

■ If you converted the lead to a deal registration, the Associated Deal Registration field value is the same as the new deal registration name that you specified on the Convert Lead page.

■ If you converted the lead to a deal registration, the new deal registration record created from the conversion process is also linked to the converted lead.

■ If you converted the lead to an opportunity (Step 4) or deal registration (Step 8), the new opportunity or deal registration record inherits some field values from the lead.

■ You can still view the lead record, but the business processes shift to the appropriate opportunity or deal registration record.

NOTE: You can convert the same lead to an account or contact multiple times, but you can only convert a lead to a deal registration or opportunity once. If you have converted a lead to a deal registration or opportunity, you cannot later convert it to a different deal registration or opportunity. However, a lead that has been converted to a deal registration can be re-converted to a different account or contact.

Access Profile and Role Settings for Converting Leads

To convert leads to accounts, contacts, deal registrations, or opportunities, you must have the appropriate settings in your user role and in your access profiles. Depending on the record types that are involved in a lead conversion process and on how your company administrator sets up the Lead Conversion page, one or more of the following options can be available for converting a lead:

■ Do Not Convert

■ Auto-Create

■ Use Existing

This topic describes the role and access profile settings that are required to convert a lead depending on which of the available options is used and on the record types that are involved in the conversion process.

Role Settings for Converting Leads

To convert a lead to a record of a given record type, your user role must be set up as follows:

- The Convert Leads privilege must be enabled.

- To enable you to convert a lead to another record type using the Use Existing option, the Has Access setting must be enabled for the relevant record type.

- To enable you to convert a lead to another record type using the Auto-Create option, the Has Access and Can Create settings must be enabled for the relevant record type.

Access Profile Settings for Converting Leads

The following tables show the minimum access levels that enable you to convert leads. The access levels shown here must be available on the access profile that Oracle CRM On Demand uses to extract your access level for a record of a given record type.

The following table shows the minimum access level required for the Lead record type.

Record Type	Access Level
Lead	Read/Edit

The following table shows the minimum access level required for the record types that are related to the Lead record type.

Record Type	Related Record Type	Access Level
Lead	Completed Activities	Read/Edit
	Open Activities	Read/Edit
	Custom Objects 01 through 03	Read
	Custom Objects 04 through 40	Read/Edit
	Lead Teams	Read/Edit

The following table shows the minimum access level required for the other top-level record types that are involved in the conversion process, depending on the option that you choose in the conversion process.

NOTE: If you choose the Do Not Create option for a record type on the Lead Conversion page, then the level of access that you have to the record type is not relevant.

Record Type	Use Existing	Auto-Create
Account	Read-Only	Read-Only
Activity	Read-Only	Read-Only
Contact	Read-Only	Read-Only

Record Type	Use Existing	Auto-Create
Deal Registration	Not Applicable	Read-Only
Opportunity	Not Applicable	Read-Only

The following table shows the minimum access level required for the related record types, depending on the option that you choose in the conversion process.

Record Type	Related Record Type	Use Existing	Auto-Create
Account	Account Team	Read/Create/Edit	Read/Create/Edit
	Addresses	Read-Only	Read/Create if the lead contains an address; otherwise, the access level is not relevant
	Custom Objects 01 through 03	Read/Create/Edit	Read/Create/Edit
Contact	Accounts	Read-Only	Read-Only
	Addresses	Read-Only	Read/Create if the lead contains an address; otherwise, the access level is not relevant
	Contact Team	Read/Create/Edit	Read/Create/Edit
	Custom Objects 01 through 03	Read/Create/Edit	Read/Create/Edit
Opportunity	Contacts	Not Applicable	Read/Create
	Custom Objects 01 through 03	Read/Create/Edit	Read/Create/Edit
	Opportunity Team	Read/Create/Edit	Read/Create/Edit
	Revenues	Not Applicable	Read/Create/Edit

Access to Activities and Custom Object Records Associated with Leads

In the standard application, a lead conversion fails if you do not have edit access to all of the following:

■ The lead's associated activities.

■ The lead's associated records of a custom object record type, if you select the option to associate those records with the account, contact, or opportunity in the Convert Lead page.

However, if your administrator selects the Convert Only Editable Related Objects setting on the company profile, then you can successfully convert a lead even if you do not have edit access to all of the activities and relevant custom object records that are associated with the lead. In that case, only the associated records to which you have edit access are linked to the records that are created or updated after the conversion.

For information about how Oracle CRM On Demand determines which access profile to use, see the following topics:

■ How Access Rights for Working with Primary Record-Type Records Are Determined

■ How Access Rights for Working with Related Record-Type Records Are Determined

NOTE: To convert leads to deal registrations, your company must be set up to use Oracle CRM On Demand Partner Relationship Management Edition. For more information on configuring Partner Relationship Management, see *Oracle CRM On Demand for Partner Relationship Management Configuration Guide*.

Rejecting Leads

Instead of converting a qualified lead to an opportunity, you might decide that the lead is not as valuable as the evaluator indicated and remove it from the lead management process. Rejecting a lead does not delete it, but retains the lead in your company's records with a status of Rejected.

Before you begin. To perform this procedure, your user role must include the Reject Leads privilege.

To reject a qualified lead

1   Select the lead you want to reject.

For instructions on selecting leads, see Finding Records (on page 68).

2   On the Lead Detail page, click Reject.

3   On the Reject a Lead page, enter this information:

■ In the Reject Code field, select a value from the drop-down list.

■ (Optional) In the Reject Reason field, enter the reason for the rejection.

NOTE: If the Reject Code is set to Other, the Reject Reason field is required.

■ To reassign the lead to a new owner, select the Reassign Owner check box.

If your company administrator has set up lead assignment rules, then selecting the Reassign Owner check box triggers the assignment manager to reassign the lead by using the lead assignment rules. Depending on your company's policies, the rejected lead may be reassigned to the original owner or to the original owner's manager. The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. The assignment manager cannot reassign records if the record type is configured in book mode. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

4 Click Confirm Reject.

The Lead Detail page reappears with information about the rejection, including your name, Reject Code, and, if specified, the reason for the rejection. The lead Status field value is changed to Rejected.

Analysing Lead Follow-up

In the standard edition of Oracle CRM On Demand, the Lead Follow-up Analysis section of the Leads Homepage provides information to help you to analyse the progress made towards qualifying leads in the last 90 days.

In this section of the Leads Homepage, you can do the following:

- Evaluate the performance of the sales team from different perspectives.

- View the lead status for each sales team member by selecting Lead Owner or Sales Person.

- View data by month or week to see the status of leads for those periods.

- Identify what actions are required to move the leads through the sales process.

- Click a segment on the chart to view a lead list.

- Download or print these analyses.

Leads Fields

Use the Lead Edit page to add a lead or update details for an existing lead. The Lead Edit page shows the complete set of fields for a lead.

TIP: You can also edit leads on the Leads List page and the Lead Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information that you see on-screen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Lead Information	
Company	For a company, corresponds to the account name.
Email	The email address of the lead. For information about the characters that are supported for use in email addresses, see About Special Characters in Email Addresses (on page 64).
Never Email	Indication of lead's preference on receiving or not receiving email.
Opportunity Related Information	

Field	Description
Status	Status of the lead, such as Qualifying, Qualified, Converted, Rejected and Archived. Can only be changed on the Lead Edit page, *not* on the New Lead page. For more information about this field's values and their meanings, see Status Field Values below.
Rating	Scale rating as set up by your company, such as A = Hot, B = Warm, C = Cool and D = Cold.
Product Interest	Product or service in which the lead expresses interest.
Potential Revenue	Potential revenue, in the currency selected by you or your company administrator.
Estimated Close Date	Date and time at which the lead is expected to close.
Next Step	Description of the next step to be taken.
Source	Source categories as set up by your company, such as Advertising, Direct Mail, Event, Promotion, Referral, Trade Show, Web, Partner, Purchased, Rented and Other.
Campaign	Campaign that generates this lead or is linked to this lead.
Industry	Industry category for the lead as set up by your company.
Annual Revenues	Annual revenue for the lead's company.
Additional Information	
Associated Account	Account linked to this lead. Required for converting leads to opportunities.
Associated Contact	Contact linked to this lead. Required for converting leads to opportunities.
Associated Deal Registration	Deal Registration linked to this lead. This field is automatically set when a lead is converted to a deal registration.
Associated Opportunity	Opportunity linked to this lead. Required for converting leads to opportunities.
Owner	The owner of the lead record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Owner Full Name	The owner of the lead record.

Field	Description
Reassign Owner	Indicates that the lead should be reassigned. If your company administrator has set up lead assignment rules, selecting this field triggers the assignment manager in Oracle CRM On Demand to process the lead again and assign it according to the rules. The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. The assignment manager cannot reassign records if the record type is configured in book mode. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
	NOTE: The processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned and current system load. The name of the lead owner changes when the record is reassigned.
Sales Person	The name of the sales person your company assigns to this lead.
	Depending on how you associate an account with a lead, the Sales Person field on the lead might be updated automatically, as follows:
	■ If you explicitly associate an account with a lead by selecting an account in the Associated Account field on the lead record, and if the account has an owner assigned to it, then the Sales Person field on the lead is automatically populated with the name of the owner of the account that you select, provided that the Auto-Update Sales Person Field When Associating Account on Lead Record setting is selected on the company profile. If that setting is deselected, then the Sales Person field on the lead is not automatically populated.
	■ If you create a lead as a related record for an account, then the Associated Account field on the lead record is populated with the name of the account, but the Sales Person field on the lead record is not automatically populated, even if the Auto-Update Sales Person Field When Associating Account on Lead Record setting is selected on the company profile.
Description	Additional information describing the lead. Limit of 16,350 characters.
Web Site	The web site linked to the lead.
Ownership Status	The current status of ownership for the lead.
Profession	This field is specific to Oracle CRM On Demand Financial Services Edition.
Approximate Income	This is a currency field. This field is specific to Oracle CRM On Demand Financial Services Edition.
Date of Birth	This field is specific to Oracle CRM On Demand Financial Services Edition.
Age	This field is calculated from the Date of Birth field. This field is specific to Oracle CRM On Demand Financial Services Edition.

Field	Description
Qualified Date	Automatically populated with the current date when the Status field is set to Qualified.

Status Field Values

As a lead moves through the lead management process, the lead Status field indicates where it is in the process. Status values are an important way of filtering leads. For more information about the lead management process, see Leads (on page 238).

The following table lists the status field's possible values.

Status	Description
Archived	Results from completion of the Archiving steps (Archiving Leads (on page 249)). Lead is determined to have no value to your company and is removed from the assessment process.
Converted	Results from completion of the Converting steps (Converting Leads to Accounts, Contacts, Deal Registrations, or Opportunities (on page 250)). Lead is determined to have enough value to become an opportunity.
Qualified	Results from completion of the Qualifying steps (Qualifying Leads (on page 248)). Lead has passed the Qualify process. New owner becomes the salesperson assigned to the lead.
Qualifying	Results from completion of the Creating steps (Qualifying Leads (on page 248)). Lead has been created and is undergoing or about to start the Qualifying process. Owner defaults to the person who created the lead.
Rejected	Results from completion of the Rejecting steps (Rejecting Leads (on page 255)). Qualified lead is determined not to have as much value as the evaluator originally thought.

4 Sales

Oracle CRM On Demand provides the following record types for sales information:

- **Accounts.** Use these pages to manage information about the companies with whom you do business.

- **Contacts.** Use these pages to track people associated with your accounts and opportunities.

- **Opportunities.** Use these pages to manage potential revenue-generating opportunities.

- **Forecasts.** Use these pages to generate forecasts to project quarterly revenue based on the existing opportunities.

The Leads record type is also related to the sales area, because leads might be converted to opportunities.

Oracle CRM On Demand also provides the following record types for sales and business planning information:

- **Business Plan.** Use these pages to establish strategic goals and actions for accounts, contacts, or products.

- **Objective.** Use these pages to manage higher-level goals that you want to achieve.

- **Plan Account.** Use these pages to track how accounts are mapped to business plans.

- **Plan Contact.** Use these pages to associate contacts with business plans.

- **Plan Opportunity.** Use these pages to associate opportunities with business plans

Managing Sales

To manage sales, perform the following processes:

1 Process of Managing Opportunities (on page 262)

2 Process of Managing Accounts (on page 262)

3 Process of Managing Contacts (on page 263)

4 Process of Managing Forecasts for Sales Users (on page 263)

5 Process of Managing Forecasts for Forecast Administrators (on page 264)

6 Process of Managing Calendar and Activities (on page 264)

Process of Managing Opportunities

To manage opportunities, perform the following tasks:

1   Review opportunity fields and related information, see Opportunity Fields (on page 335).

2   Create a new opportunity record, see Creating Records (on page 51).

3   Add product revenue records to the opportunity, see Linking Products to Opportunities (on page 324).

4   Define the key contacts and contact roles, see Contacts (on page 289) and Adding Roles.

5   Track activities and notes that are related to opportunities, see Activity Fields (on page 222) and Adding Notes (on page 143).

6   Assign opportunity ownership and visibility, see Access Profile Management and Sharing Records (Teams) (on page 134).

7   Update the opportunity sales stage, see About Opportunities and Forecasts (on page 315).

8   Link partners and competitors related to the opportunity, see Tracking Partners and Competitors of Opportunities (on page 322).

9   Assess and forecast the opportunity, see About Opportunities and Forecasts (on page 315).

Process of Managing Accounts

To manage accounts, perform the following tasks:

1   Review the account fields and related information, see Account Fields (on page 286).

2   Create a new account record, see Creating Records (on page 51).

3   Define the key contacts and contact roles, see Contacts (on page 289) and Adding Roles.

4   Track the account-related activities and notes, see Activity Fields (on page 222) and Adding Notes (on page 143).

5   Assign the account ownership and visibility, see Access Profile Management and Sharing Records (Teams) (on page 134).

6   Associate partners and competitors with the account, see Tracking Partners and Competitors of Accounts (see "Tracking Account Partners and Competitors" on page 279).

7   Define the account relationships, see Tracking Relationships Between Accounts (on page 275).

    Note: This step is specific to Oracle CRM On Demand Financial Services Edition.

8   Add the revenue records to the account, see Tracking Revenue Based on Accounts (on page 282).

Note: This step is specific to Oracle CRM On Demand Financial Services Edition.

9 Forecast the account revenue, see Tracking Revenue Based on Accounts (on page 282).

Note: This step is specific to Oracle CRM On Demand Financial Services Edition.

10 Track the account assets, see Tracking Assets (on page 280).

Process of Managing Contacts

To manage contacts, perform the following tasks:

1 Review the contact fields and related information, see Contact Fields (on page 311).

2 Create a new contact record, see Creating Records (on page 51).

3 Track the contact-related activities and notes, see Activity Fields (on page 222) and Adding Notes (on page 143).

4 Assign contact ownership and visibility, see Access Profile Management and Sharing Records (Teams) (on page 134).

5 Complete a customer satisfaction survey, see Using Assessment Scripts (on page 156).

6 Define the contact relationships, see Tracking Relationships Between Contacts (on page 303).

Note: This step is specific to Oracle CRM On Demand Financial Services Edition.

7 Add the revenue records to the contact, see Tracking Revenue Based on Contacts (on page 304).

Note: This step is specific to Oracle CRM On Demand Financial Services Edition.

8 Forecast the contact revenue, see Tracking Revenue Based on Contacts (on page 304).

Note: This step is specific to Oracle CRM On Demand Financial Services Edition.

9 Track the contact assets, see Tracking Assets (on page 280).

Note: This step is specific to Oracle CRM On Demand Financial Services Edition.

Process of Managing Forecasts for Sales Users

To manage forecasts, perform the following tasks:

1 Set the quotas, see Managing Quotas (on page 346).

2 Forecast the opportunities, accounts, and contacts, see Forecasts (on page 338).

3 Review the forecasts, see Reviewing Forecasts (on page 341).

4 Update the forecasts, see Refreshing Forecasts (on page 342).

5 Submit the forecasts, see Submitting Forecasts (on page 345).

Process of Managing Forecasts for Forecast Administrators

To manage forecasts, perform the following tasks:

1 Set up the company's fiscal calendar, see Setting Up Your Company Profile and Global Defaults.

2 Determine the forecast hierarchy, see Setting Up the Forecast Definition.

3 Set the user quotas, see Setting Up Users' Sales Quotas.

4 Create the forecast definition, including Date, Type, Duration, and Participants, see Setting Up the Forecast Definition.

Process of Managing Calendar and Activities

To manage calendar and activities, perform the following tasks:

1 Review the current calendar appointments, see Calendar and Activities (on page 177).

2 Create the new appointments and tasks, see Creating Activities (on page 189).

3 Share your calendar with other users, see Viewing the Calendars of Other Users (on page 214).

4 Track and manage the key tasks, see Calendar and Activities (on page 177).

Leads (Sales Aspects)

Leads play an important role in the sales process. The sales process might originate with lead generation. Leads move progressively through qualification to conversion. For more information about the sales process, see Managing Marketing (on page 229). You can convert leads to contacts, accounts, deal registrations, and opportunities. After a lead has been converted to an opportunity or deal registration, it enters the sales process. Certain fields in the opportunity or deal registration record obtain their values from the lead record. These values are based on mapping the leads that have been converted during the sales process.

Accounts

Use the Account pages to create, update, and track accounts. *Accounts* are generally companies that you do business with, but you can also track partners, competitors, affiliates, and so on as accounts.

If account records are central to how your company manages its business, as is the case in many companies, enter as much information about accounts as you can. Some of that information, such as the Region or Industry field, can be used in reports as a way to categorise information. Similarly, if you link a record, such as an opportunity, to an account record with the Region or Industry field filled in, those opportunities can be categorised by those values.

Related Topics

See the following topic for related information:

■ Managing Accounts (on page 267)

Working with the Account Homepage

The Account Homepage is the starting point for managing accounts.

NOTE: Your company administrator can customise the layout of your Account Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating an Account

You can create an account by clicking the New button in the My Recently Viewed Accounts section. For more information, see Creating Records (on page 51) and Account Fields (on page 286).

Working with Account Lists

The Account Lists section shows a number of filtered lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for accounts.

Account List	Filters
All Accounts	All accounts, sorted alphabetically by Account Name
All Customer Accounts	Accounts where the account type is set to customer
All Account Competitor Accounts	Accounts where the account type is set to competitor
All Account Partner Accounts	Accounts where the account type is set to

Account List	Filters
	partner
All Prospect Accounts	Accounts where the account type is set to prospect
Recently Created Accounts	All accounts, sorted by the created date
Recently Modified Accounts	All accounts, sorted by the modified date
All Referenceable Accounts	Accounts with the Reference check box selected
All Top Accounts	Accounts where the priority is set to high
My Accounts	Accounts where your name is in the Owner field

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Viewed Accounts

The My Recently Viewed Accounts section shows the accounts that you viewed most recently.

Working with Account Tasks

The My Open Account Related Tasks section shows the tasks assigned to you, sorted by the due date and then by priority. You or your manager set the due date and priority. The task priority, such as 1-High, 2-Medium, or 3-Low, is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority.

NOTE: If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values.

- To review a task, click the Subject link.

- To review the account with which the task is associated, click the account name.

- To expand the list of tasks, click Show Full List.

Using Reports to Analyse Account Performance

One or more report sections might be shown on your Account Homepage (your company administrator can specify which report sections are shown on the page). In the standard edition of Oracle CRM On Demand, the Account Analysis section is shown, which displays a comprehensive analysis of how accounts are distributed and of the closed revenue. For information about using the Account Analysis section, see Analysing Account Performance (on page 286).

Adding Sections to Your Account Homepage

If your user role includes the Personalise Homepages privilege, you can add additional sections to your Account Homepage, depending on which sections your company administrator has made available for display on your Account Homepage.

To add sections to your Account Homepage

1 On the Account Homepage, click Edit Layout.

2 On the Account Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Managing Accounts

To manage accounts, perform the following tasks:

■ Reassigning Accounts (on page 268)

■ Changing an Account Primary Contact (on page 269)

■ Linking Records to Accounts (on page 270)

■ Linking Portfolio Accounts (on page 273)

■ Specifying Parent Accounts (on page 273)

■ Limiting Account Records Displayed (on page 274)

■ Tracking Relationships Between Accounts (on page 275)

   NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

■ Tracking Relationships Between Accounts and Contacts (on page 276)

■ Tracking Account Partners and Competitors (on page 279)

■ Tracking Assets (on page 280)

■ Tracking Revenue Based on Accounts (on page 282)

   NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- Tracking Visits (Sales Calls) to Customers (on page 198)

  NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- Creating Appointments for Multiple Accounts (on page 285)

- Analysing Account Performance (on page 286)

If your user role includes the Maps Integration privilege, then you can also perform this procedure, Performing Proximity Searches (on page 378).

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)

- Updating Record Details (on page 103)

- Linking Records to Your Selected Record (on page 104)

- Working with Lists (on page 112)

- Using Assessment Scripts (on page 156)

- Sharing Records (Teams) (on page 134)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

- Account Fields (on page 286)

- Working with the Account Homepage (on page 265)

- Displaying Images on Record Detail Pages (on page 65)

- Working with Oracle Social Network (on page 467)

- Reports (on page 907)

- Using the Offline Client (on page 878)

- Importing Your Data

Reassigning Accounts

If your access levels permit you to do so, you can reassign an account manually by changing the owner or primary custom book on the account record.

NOTE: Depending on the record ownership mode that your company administrator configures for the Account record type, you can assign an account record to an owner or to a primary custom book; however, you cannot

assign an account record to both an owner and a primary custom book. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

If your company uses the assignment manager and the Account record type is configured for the user mode or mixed mode of record ownership, then you can also reassign an account to a new owner by selecting the Reassign Account check box on the request.

To reassign an account

1 Select the account that you want to reassign.

For information on selecting accounts, see Finding Records (on page 68).

2 On the Account Detail page, click Edit.

3 On the Account Edit page, do one of the following:

■ In the Owner field or the Book field, click the Lookup icon, and then select another user or book in the Lookup window.

■ Select the Reassign Account check box to trigger the assignment manager to reassign the account.

NOTE: The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. The assignment manager cannot reassign records if the record type is configured in book mode. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

4 Save your changes.

NOTE: The processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned and current system load.

Changing an Account Primary Contact

An account can have multiple contacts, but one of the contacts must be specified as the primary contact for the account. By default, the first contact added for the account is the primary contact, but you can change this setting.

To change an account primary contact

1 Select the account.

For instructions on selecting accounts, see Finding Records (on page 68).

2 On the Account Detail page, click Edit.

NOTE: If the Primary Contact field is not displayed on the Account Detail and Account Edit page, contact your company administrator to have the field added to your page layout.

TIP: If the inline edit feature is enabled for your company, you can change the primary contact inline on the Account Detail page. For more information on inline editing, see Updating Record Details (on page 103).

3 On the Account Edit page, click the Lookup icon on the Primary Contact field.

4 In the Lookup window, select the new primary contact.

NOTE: Only those contacts that are already linked to the account are available for you to select as the Primary Contact on the account. In addition, if the Account Contact List field appears in the Lookup window, then only the Contact list, which contains the contacts already linked to the account, is available for selection in the Account Contact List field. You cannot select a different list to search for a contact.

5 On the Account Edit page, click Save.

NOTE: In the Contacts related information section of the Account Detail page, the primary contact for the account always appears as the first contact in the list of contacts that are linked to the account, even if the Primary Contact check box is not shown in the Contacts related information section of the Account Detail page. If you click Show Full List to open the full list of linked contacts, then the primary contact might appear as the first record on the list page, even if you sort the list using a field such as Last Name or First Name.

The position of the primary contact in the list depends on how many records are in the list and the number of records that you display on your list page. For example, assume that you have a total of 180 contacts linked to an account, the last name of the primary contact for the account begins with the last letter of the alphabet, and you display 100 records on your list page. In that case, the primary contact appears as the first record in the second page of your list when you sort the list using the Last Name field.

Linking Records to Accounts

You can link the new records that you create on the Detail page, such as contacts and activities, to the account record. Linking associates records to each other so that you and others who have access rights to the record obtain a full view of the information.

New records are added to the database at the same time that they are linked to the selected account. For example, a contact that you create on the Account Detail page is linked to the account and then appears on the Contacts pages.

An account record contains information that, after linking to another record, is inherited. For example, some opportunity reports display the records by Region or Industry. Since Region and Industry are not part of the opportunity records, the system looks to linked account records to determine the group to which the opportunity belongs. Therefore, whenever possible, you should link records to the account record.

You can also link other users to an account record to allow them to view the record. For example, you might need to share an account record with a team of colleagues you are working with to close a deal. Based on each role, a team member might have different access requirements for the account record, and the contact and opportunity records that are linked to the account.

To link information to an account

1 Select the account.

For instructions on selecting accounts, see Finding Records (on page 68).

2 On the Account Detail page, scroll to the appropriate section, and link records to the account, as necessary.

NOTE: Your company administrator determines the type of related information that can be displayed on your Account Detail page. You can change the order of the related information sections that are available to you or hide any related information that you are not using. For information about personalising Detail page layouts, see Changing Your Detail Page Layout (on page 855).

The following table lists some of the record types that you might be able to link to an account.

Record Type	Information
Opportunities	To link a new opportunity, click New, enter the required information in the Edit form and save the record. For field descriptions, see Opportunity Fields (on page 335).
Service Requests	To link a new service request, click New, enter the required information in the Edit form and save the record. For field descriptions, see Service Request Fields (on page 421).
Notes	To link a new note, click New, enter the required information and save the record. **NOTE:** You can also add notes by clicking the note icon at the top-right of the page, if this feature is enabled for your company. For more information about notes, see Adding Notes (on page 143).
Open Activities (Appointments and Tasks)	To link a new task or appointment, click New Task or New Appt. Then enter the required information in the Edit form and save the record. For field descriptions, see Activity Fields (on page 222). You can link several activities to an account. If an activity has a time associated with it, the activity appears in the Activities list and Calendar. Users that have visibility to an account can also see the activities linked to the account, including those activities owned by or assigned to others.
Contacts	To link a new contact, click New, enter the required information in the Edit form and save the record. For field descriptions, see Contact Fields (on page 311). **TIP:** To avoid duplicating contact records, you can also click Add, and then click the Lookup icon next to the New Contact column. In the Lookup window, enter the First Name, Last Name, or email address, and click Go. If the application doesn't find the contact, click New to create the contact record. If you know the contact record exists, click Add to link it to this record. To open the Contact Detail page to update information about the contact, click the Name link. For more information about linking

Record Type	Information
	contacts to accounts, see Tracking Relationships Between Accounts and Contacts (on page 276).
Account Team	To allow this record to be visible to other employees, click Add Users. In the Account Team Add User window, select the employee's name and specify the access level. For more information on sharing records, see Sharing Records (Teams) (on page 134).
Account Partners	To link an account and track it as your partner with this account, click Add. Then enter the required information in the Edit form and save the record. For field descriptions, see Tracking Partners and Competitors of Accounts (see "Tracking Account Partners and Competitors" on page 279).
Account Competitors	To link an account and track it as your competitor for this account, click Add. Then enter the required information in the Edit form and save the record. For field descriptions, see Tracking Partners and Competitors of Accounts (see "Tracking Account Partners and Competitors" on page 279).

To remove or delete a linked record

1   Select the account.

For instructions on selecting accounts, see Finding Records (on page 68).

2   On the Account Detail page, scroll down to the appropriate section.

3   In the row whose link you want to remove or delete, choose Remove or Delete from the record-level menu.

- ■ **Remove.** This disassociates the records without deleting either record.

- ■ **Delete.** This deletes the linked record. A deleted record is moved to the Deleted Items page and is permanently removed from the database after 30 days.

Related Topics

See the following topics for related information:

■ Attaching Files and URLs to Records (on page 150)

■ Deleting and Restoring Records (on page 161)

■ Tracking Assets (on page 280)

Linking Portfolio Accounts

This feature is specific to Oracle CRM On Demand Financial Services Edition.

You can link portfolio accounts to an account with a many-to-one relationship. In other words, you can link many portfolio accounts to one account, but each portfolio account can be linked to only one account.

Before you begin. The Portfolio related information is not shown on the Account Details page by default. To allow you to see this information, your company administrator must grant access to the Portfolio related information to your role. You or your company administrator must then add the Portfolio related information to your Account Details page layout. For more information on customising your Detail page layouts, see Changing Your Detail Page Layout (on page 855).

To link a portfolio subaccount

1   Select the parent account.

For information on selecting accounts, see Finding Records (on page 68).

2   On the Account Detail page, scroll to the Portfolio related information, and click New.

3   Complete the fields in the Portfolio Account Edit page that is launched.

For more information about portfolio accounts, see Portfolio Account Fields (on page 751).

4   Save the record.

Specifying Parent Accounts

You can indicate account hierarchies, such as a company that is a subsidiary of another company, by specifying a parent-child relationship. First create the parent account and then select that account as the parent for the child or subaccount.

To specify the parent account

1   Select the child account.

For instructions on selecting accounts, see Finding Records (on page 68).

2   On the Account Detail page, click Edit.

NOTE: If the inline edit feature is enabled for your company, you can specify the parent account inline on the Account Detail page. For more information on inline editing, see Updating Record Details (on page 103).

3 On the Account Edit page, click the Lookup icon next to the Parent Account field.

4 In the Lookup window, select the parent account.

5 Save the record.

Related Topics

See the following topics for related information:

■ Finding Records (on page 68)

■ Account Fields (on page 286)

Limiting Account Records Displayed

You can limit the accounts you see by selecting a filtered list. A list shows a subset of the accounts that meet the criteria saved with the list.

Before you begin:

■ When you create a list, you need to enter the fields and values for the criteria you set up. You might want to go to the Account Edit page and write down the exact field names and values as they are used in your application. Otherwise, your filtered list may not pick up the correct records. Alternatively, you can print the record Detail page to capture the exact field names; however, the printout does not capture the field values for drop-down lists.

■ If you are using Oracle Offline On Demand (the Offline client), the number of records that you can download at a time is restricted. By default, the Offline client restricts you to downloading 250 accounts at a time. Your company administrator can request an increase in this number. However, increasing the number could increase the amount of time it takes to complete the download process. If your account records exceed the maximum that you are allowed to download, create filtered lists that divide your accounts into smaller amounts, such as accounts based on different Priority values, or on location. Then, during the download process, select the filtered lists that you have created to make sure all your account records are copied to your laptop or desktop.

To open a filtered list for accounts

1 Click the Accounts tab.

2 From the Account Lists section on the Account Homepage, select the list you want to work with.

For a description of default account filtered lists, see Working with the Account Homepage (on page 265).

To create a filtered list for accounts

1 Click the Accounts tab.

2 From the Account Lists section on the Account Homepage, click the Manage Lists link.

3 On the Manage Lists page, click the New List button.

4 Complete the steps described in Creating and Refining Lists (on page 118).

Related Topics

See the following topics for related information:

■ Account Fields (on page 286)

■ Working with Activity Lists (on page 192)

■ Working with the Account Homepage (on page 265)

Tracking Relationships Between Accounts

When you want to track relationships between accounts, store the information in the Account Relationship pages. For example, you might want to track investor or affiliate relationships for this account.

To do so, first link the account whose relationship you want to track to this account record. (You can link as many accounts as you want.) Then define the relationship and add any other pertinent information.

NOTE: The tracking relationship feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company. To enable your company to track relationships between accounts, the Manage Extended Contact and Account Relationship Access privilege must be included in your company administrator's role, and your company administrator must enable the Access Extended Account Relationship privilege for the users who will track relationships between accounts.

Company administrators can create custom fields to store additional information about account relationships and add those custom fields to the Account Relationship Edit page layout. Then, users who have access to the account relationship records can view and update the information in the custom fields.

Before you begin. Create an account record for each organisation you want to link to the account. This feature might not be available in your version of the application.

To track relationships between accounts

1 Select the account.

For instructions on selecting accounts, see Finding Records (on page 68).

2 On the Account Detail page, scroll down to the Account Relationships section and perform one of the following:

■ To link an account, click Add.

■ To update information, click the Edit link in the row for the existing account relationship.

3 On the Account Relationship Edit page, enter the required information.

The following table describes some field information for tracking relationships between accounts.

Field	Comments

Field	Comments
Related Account	Click the Lookup icon, and select the account whose relationship and information you want to track. This is a required field.
Role	Select an option that defines the relationship between the accounts.
Reverse Role	Select an option that defines the reverse relationship between the accounts.
Start Date	You can use this field to record the start date of the relationship between the accounts. The default is today's date.
End Date	Use this field to record the expiration date of the relationship between the accounts.

4 Save the record.

Tracking Relationships Between Accounts and Contacts

You can link accounts to contacts in a number of ways. From an Account Detail page, you can link existing contacts to the account, and you can also create new contacts that are automatically linked to the account. Similarly, from a Contact Detail page, you can link existing accounts to the contact, and you can also create new accounts that are automatically linked to the contact.

About the Information for an Account Contact

After you link an account and a contact, you can view the details of the account contact in the Account Contact Edit page. Company administrators can create custom fields to store additional information about account contacts and add those custom fields to the Account Contact Edit page layout. Then, users who have access to the account contact records can view and update the information in the custom fields.

Company administrators create custom fields for account contacts through the Account Contact Fields link, which is available for both the Account and the Contact record types in the application customisation pages of Oracle CRM On Demand. Company administrators create layouts for the Account Contact Edit page through the Account Contact Page Layout link, which is also available for both the Account and the Contact record types. For more information about adding custom fields and creating page layouts, see Application Customisation.

About the Primary Contact for an Account

You can link multiple contacts to an account, but one of the linked contacts must be specified as the primary contact for the account. The first contact that is linked to an account is automatically specified as the primary contact for the account, but you can later specify a different primary contact for the account. For information about changing the primary contact for an account, see Changing an Account Primary Contact (on page 269).

The name of the primary contact is shown in the Primary Contact field on the Account Detail page, if that field is present in your Account Detail page layout. Also, in the Contacts related information section of the Account

Detail page, if the Primary Contact check box is present in the layout, then the check box is selected in the row for the primary contact. Your administrator determines whether the Primary Contact field and the Primary Contact check box are present on the layouts.

In the Contacts related information section of the Account Detail page, the primary contact for the account always appears as the first contact in the list of contacts that are linked to the account, even if the Primary Contact check box is not shown in the Contacts related information section of the Account Detail page. If you click Show Full List to open the full list of linked contacts, then the primary contact might appear as the first record on the list page, even if you sort the list using a field such as Last Name or First Name.

The position of the primary contact in the list depends on how many records are in the list and the number of records that you display on your list page. For example, assume that you have a total of 180 contacts linked to an account, the last name of the primary contact for the account begins with the last letter of the alphabet, and you display 100 records on your list page. In that case, the primary contact appears as the first record in the second page of your list when you sort the list using the Last Name field.

About Contact Roles

When you link an account and a contact, you can specify the roles that the contact has at the account. Recording a contact's role at a company is critical to understanding the influence that the contact has on buying decisions at the account. For example, you might want to track the following contact relationships for an account: Approver, User and Evaluator, User and Approver, User and Decision Maker, Evaluator and Approver, Evaluator and Decision Maker, and Unknown.

The following procedure describes how to link contacts to an account.

To link contacts to an account

1   Select the account that you want.

    For information on selecting records, see Finding Records (on page 68).

2   To create a new contact that is linked to the account, do the following:

    a   On the Account Detail page, in the Contacts related information section, click New.

    b   On the Contact Edit page, enter the information for the new contact, and then save your changes.

        NOTE: Certain fields on the Contact Edit page might be automatically populated with values from the account record.

3   To link an existing contact to the account, do the following:

    a   On the Account Detail page, in the Contacts related information section, click Add.

    b   On the Contacts List page, click the Lookup icon, and select the contact that you want to link to the account.

        You can link up to five contacts to the account in the Contacts List page.

    c   (Optional) For each contact, select an option that defines the primary role of the contact at the account.

NOTE: After you link a contact to the account, you can add additional roles for the contact at the account.

d Save your changes.

The following procedure describes how to link accounts to a contact.

To link accounts to a contact

1 Select the contact that you want.

For information on selecting records, see Finding Records (on page 68).

2 To create a new account that is linked to the contact, do the following:

a On the Contact Detail page, in the Accounts related information section, click New.

b On the Account Edit page, enter the information for the new account, and then save your changes

3 To link an existing account to the contact, do the following:

a On the Contact Detail page, in the Accounts related information section, click Add.

b On the Add Account page, click the Lookup icon, and select the account that you want to link to the contact.

You can link up to five accounts to the contact in the Add Account page.

c (Optional) For each account, select an option that defines the primary role of the contact at the account.

NOTE: After you link an account to the contact, you can add additional roles for the contact at the account.

d Save your changes.

The following procedure describes how to view and update the details of an account contact.

To view and update the details of an account contact

1 Perform one of the following:

■ On the Account Detail page, in the Contacts related information section, click the Edit link for the contact.

■ On the Contact Detail page, in the Accounts related information section, click the Edit link for the account.

The Account Contact Edit page shows the details of the related contact. The fields in the page might be read-only, or you might be able to add and change information on the page, depending on how your company administrator sets up the page layout.

2 Update the information as required, and then save your changes.

The following procedure describes how update the role information for an account contact.

To update the role information for an account contact

1 Perform one of the following:

■ On the Account Detail page, in the Contacts related information section, click the Edit Roles link for the contact.

■ On the Contact Detail page, in the Accounts related information section, click the Edit Roles link for the account.

The Account Roles page or the Contact Roles page shows the available and selected roles for the account contact.

2 In the Account Roles page or the Contact Roles page, in the Available section, select the roles for the contact, and then use the directional arrow to move the roles to the Selected section.

3 Use the up arrow and down arrows to change the order of the roles in the Selected section.

The role at the top of the list is the primary role.

4 Save your changes.

Tracking Account Partners and Competitors

Oracle CRM On Demand provides areas in the application where you can track information on either partners or competitors for your accounts. For example, you might want to track which companies (accounts) you do business with for Account XYZ or which companies (accounts) you compete against for Account XYZ.

To do so, first link the account acting as your partner or competitor to the account record. You can link as many partner or competitor accounts as you want. Then add information, such as the strengths and weaknesses, about the partner or competitor to the Account Partner Edit or Account Competitor Edit page.

NOTE: When you add an account partner or account competitor, a reciprocal record is created under the selected account. For example, if you add Account 123 as an account partner of Account XYZ, you automatically see Account 123 listed in the Account Partner list for Account XYZ.

For information on converting existing accounts to partner accounts, see Converting Accounts to Partner Accounts (on page 473).

Before you begin. Create an account record for each partner or competitor that you want to link to the account. For instructions on adding records, see Creating Records (on page 51).

To track partner and competitor information for accounts

1 Select the account.

For instructions on selecting accounts, see Finding Records (on page 68).

2   On the Account Detail page, scroll down to the Account Partners or Account Competitors section, and do one of the following:

   ■   To link an account, click Add.

   ■   To update information, click the Edit link next to the existing partner or competitor.

3   On the Account Partner Edit or Account Competitor Edit page, enter the required information.

The following table describes some field information for tracking partner or competitor information.

Field	Comments
Account Partner	Click the Lookup icon, and select the account whose relationship and information you want to track as your partner when dealing with this account. This is a required field.
Account Competitor	Click the Lookup icon, and select the account whose relationship and information you want to track as your competitor for this account. This is a required field.
Role	Select an option that defines the relationship between the accounts.
Reverse Role	Select an option that defines the reverse relationship between the accounts.
Start Date	You can use this field to record the start date of a partnership. The default is today's date. This is a required field.
End Date	You can use this field to record the expiry date of a partnership.
Primary Contact	The most important contact for the partner or competitor relationship.

4   Save the record.

Tracking Assets

When you want to track a product you've sold to a customer or company, link the product record to the account as an asset.

To link a product record to an account as an asset

1   Select the account.

For instructions on selecting accounts, see Finding Records (on page 68).

2   On the Account Detail page, scroll to the Assets section, and do one of the following:

   ■   To create an asset, click New.

      By default, the creator of the asset is the owner of the asset.

■ To update asset information, click the Edit link next to the existing asset.

3 On the Asset Edit page, enter the required information.

NOTE: If you are using an industry-specific version of Oracle CRM On Demand, assets might be listed under different headings. For example, in Oracle CRM On Demand Automotive Edition, assets are listed as *vehicles.*

The following table describes some fields for tracking asset information. If you are using an industry-specific version of Oracle CRM On Demand, you might see additional fields.

Field	Description
Key Asset Information	
Product Name	Product supplied to the customer. When you link the product record, these fields are copied from the product definition: Product Category, Part #, Type and Status.
Purchase Price	Price paid for the product.
Quantity	Number of units the customer purchased.
Ship Date	Defaults to today's date.
Product Category	Read-only. Copied from the product definition.
Part #	Read-only. Copied from the product definition.
Type	Read-only. Copied from the product definition.
Operating Status	Default values are Inactive, Active, Idle, Up, Limited Use, Maintenance, Down, Critical Down.
Warranty	Time period of the warranty.
Contract	Type of contract, such as Bronze, Gold, Platinum or Silver.
Currency	Currency corresponding to the Purchase Price. You can select another currency to convert the price to another currency, if your company administrator set up that feature.
Notify Date	Date that appears in the task record. If you enter a Notify Date on the asset record, a task is created when you save this asset record. The task appears as &"Asset Name requires follow-up" on My Homepage, Account Homepage and Calendar. **TIP:** Set the date to give you time for follow-up tasks regarding this asset, such as notification that a contract or warranty is about to expire. **NOTE:** The automatic creation of a task feature is only activated when you enter a notify date on an asset record, not on a contact record.

Field	Description
Asset Type	The type of asset. **NOTE:** In the standard application, assets are included in the lists of portfolio accounts in Oracle CRM On Demand. However, if your administrator selects the Exclude Vehicle/Assets Records from Portfolio Accounts check box on the company profile, then only the assets that have a value of Portfolio in the Asset Type field are included in the lists of portfolio accounts.
Additional Information	
Description	Additional information about the asset. Limit of 250 characters.

Tracking Revenue Based on Accounts

Before you begin. This feature is specific to Oracle CRM On Demand Financial Services Edition.

You can track revenue information for each of your accounts, which allows your company to base its forecasts on account revenue. To do so, you add revenue records to accounts.

Adding revenue records to accounts allows you to:

- Track products, product categories or revenues forecasted for each account
- Base your company's forecasts on account revenue

If your company bases its forecasts on accounts, only records that meet these criteria are included in the forecast:

- Revenue record for the account must have a Status of Open, Pending or Closed.
- Revenue record for the account must have the Forecast field checked.
- Revenue record cannot be linked to an opportunity.

Before you begin. Your company needs to inform you of the forecasting method that it wants to use. Companies can forecast revenue for any of the following: opportunity revenue, opportunity product quantity and revenue, account revenue, or contact revenue. The company forecasting method determines which fields you need to fill in when adding revenue records to accounts.

To add revenue to accounts

1 Select the account.

   For instructions on selecting accounts, see Finding Records (on page 68).

2 On the Account Detail page, scroll down to the Revenues section and perform one of the following:

- To add a revenue record, click Add.
- To update revenue information, click the Edit link next to the existing revenue record.

3 On the Revenue Edit page, complete the Revenue Fields.

NOTE: If your company does not use account revenue for its forecasts, it is best to leave the Forecast checkbox blank on the Revenue page.

4 Save the record.

Revenue Fields

The following table describes field information for revenue. Your company administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

NOTE: Account and Contact Revenue forecasting require that Revenues be enabled for both Accounts and Contacts. This functionality must be set up for your company. For more information, contact your company administrator.

CAUTION: If your company bases its forecasts on account or contact revenue, the information that you enter for revenue can affect its calculations.

Field	Description
Key Product Information	
Start/Close Date	For an account or contact, the expected revenue close date. For recurring revenue, the start date. For recurring revenue with a close date that ends on the last day of the month and a start date of mid-month, add one record for the full recurring price and another record for the pro rata order.
	For example: You start supplying disposables to a company or client on May 15th. After that, you will be sending $500 worth of disposables at the end of each month until the end of the year.
	For the mid-month order, add a record with these values: Revenue = $250 Quantity = 1
	For the recurring order, add a second record with these values: Revenue = $500 Quantity = 1 Frequency = Monthly #of Periods = 7 (June to December).
Product Name	Only products marked Orderable by your company administrator can be selected.
Product Category	Category of the product.
Part #	Number carried over with the product definition. Read-only.
Forecast	Indicator to include this product in forecasting totals.
Type	Default values are Actual, Shipped, Invoiced, Booked, Projected and Quota. **NOTE:** The Type you set applies to the revenue record. Another Type field (read-only field), which is populated with the product information, might also appear on this page.

Field	Description
Status	If your company calculates forecasts on accounts or contacts, you must set the Status to Open, Pending or Closed for this record to be included in the forecasts. **NOTE:** The Status you set applies to the revenue record. Another Status field (read-only field), which is populated with the product information, might also appear on this page.
Quantity	Number of units the customer orders. For a recurring product, enter the quantity of the product for each recurring period. For example, if you send 10 printer cartridges each month, enter 10 here.
Revenue	Quantity multiplied by Price. The revenue cannot be overwritten. If the Forecast checkbox is selected, this revenue amount contributes to your company{\f2 '}s forecast totals. **TIP:** To forecast a specific revenue value, independent of the product or product category, set the quantity to 1 and the price equal to the revenue value.
Description	Additional information about the product. Limit of 16,350 characters.
Recurring Revenue Information	
Frequency	Indicates the frequency for a recurring product. The term *bi-weekly* means once every two weeks. When you populate this field, you must also populate the # of Periods field.
# of Periods	The number of periods for a recurring product. Recurring revenue can support a maximum of 260 periods. The length of time that is covered by the total number of periods varies based on the frequency selected (in the Frequency field). For example, if you have weekly recurring revenue, you can track revenue for up to five years. **NOTE:** When you populate this field, you must also populate the Frequency field.
Additional Information	
Owner	Person assigned to this revenue record. Generally, the owner can update record details or delete the record. However, access levels can be adjusted to restrict or expand a user's access. This value affects the records that are included in reports that you or your managers run (from Reports and Dashboard pages). Each record has only one owner. However, account, contact and opportunity records can be shared with other employees. For instructions, see Sharing Records (Teams) (on page 134).

Creating Appointments for Multiple Accounts

You can create an appointment for up to 25 accounts at one time by using the mass create appointment feature in Oracle CRM On Demand.

About Ownership of the Appointments

The Owner field for each appointment in the Account Mass Create Appointment page shows your name by default. You can select a different owner for each of the appointments, or clear the value from the Owner field, as necessary. The ownership of the appointments that you create is determined as follows:

■ If the Activity record type is configured in user mode, then the user who is selected in the Owner field for an appointment in the Account Mass Create Appointment page becomes the owner of the appointment.

  NOTE: If you clear your name from the Owner field for an appointment in the Account Mass Create Appointment page and you do not select another user, then you become the owner of the appointment by default, unless the Owner ID field is set up as a required field for the Activity record type. If the Owner ID field is set up as a required field for the Activity record type, and if you leave the Owner field in the Account Mass Create Appointment page blank, then the appointment cannot be created.

■ If the Activity record type is configured in mixed mode, then the Owner field for an appointment in the Account Mass Create Appointment page can be populated, or it can be blank, and the following happens:

  ■ If the field is populated, then the selected user becomes the owner of the appointment.

  ■ If the field is not populated, then the Owner field on the appointment is blank. However, the first time that the appointment is edited, the user who edits it might be prompted to populate either the Owner field or the Book field for the appointment, depending on how your administrator sets up these fields.

■ If the Activity record type is configured in book mode, then the Owner field for an appointment in the Account Mass Create Appointment page must be blank, that is, you must clear the value from the field. In addition, for the appointment to be created successfully, at least one of the following conditions must be true:

  ■ A custom book is selected as the default book for the Activity record type on your user record.

  ■ A custom book is selected as the default book on your user record.

  After you create the appointment, the Owner field and the Book field on the appointment are both blank. However, the first time that the appointment is edited, the user who edits it is prompted to populate the Book field, as this is a required field when the Activity record type is configured in book mode.

Use the following procedure to create an appointment for multiple accounts at one time.

To create an appointment for multiple accounts at one time

1 If necessary, create a list of accounts or filter an existing list to show the accounts for which you want to create an appointment.

2 If there are more than 25 records in the list, then change the value in the Number of records displayed field at the bottom of the Account List page to 25.

3 On the Account List page, click Menu, and select Mass Create Appointment.

4 On the Account Mass Create Appointment page, update the information for each appointment as necessary.

The fields in the Account Mass Create Appointment page show the following values when you open the page:

■ **Start Time.** The start time and date are set to 12:00 P.M. on today's date.

■ **End Time.** The end time and date are set to 60 minutes after the start time and date.

■ **Subject.** This field shows the word Appointment, followed by the name of the account.

■ **Owner.** This field shows your name.

■ **Account Name.** This field shows the name of the account.

5 Click Finish.

NOTE: If an appointment cannot be created successfully for any one of the accounts listed in the Account Mass Create Appointment page, then none of the appointments are saved, and an error message is displayed.

6 If you want to create an appointment for additional accounts in the list, then display the next page of the list and repeat this procedure as necessary.

After you create the appointments, each appointment is available as a related item in the Open Activities related information section of the Detail page for the relevant account. You can edit the appointment to update the appointment details in the same way that you edit other appointments.

Analysing Account Performance

The Account Analysis section of the Account Homepage displays an analysis of how accounts are distributed and the closed revenue. You can identify the top-performing customers and underperforming customers, as well as the new market segments.

In this section of the Account Homepage, you can place your pointer on the chart to see specific information, click a segment to review a detailed report, or change the categories in the drop-down lists to view the same data from another perspective.

Account Fields

Use the Account Edit page to add an account or update details for an existing account. The Account Edit page shows the complete set of fields for an account.

TIP: You can also edit accounts on the Account List page and the Account Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information that you see on-screen might differ from the standard information described in this table.

Account records are central to how you manage and view your data. As a result, you should enter as much information about accounts as you can. Some of that information, such as Region or Industry, can be used in

reports as a way to categorise information. Similarly, if you link a record, such as an opportunity, to an account record with Region or Industry filled in, those opportunities can be categorised by those values.

The following table provides additional information regarding some fields.

Field	Description
Key Account Information	
Account Name	Name of the account. To avoid duplicate records, make sure you follow the naming conventions your company has set up for abbreviations, capitalisation, and so on.
Location	Type of facility operated by the account at this site, such as Headquarters.
Parent Account	Company of which the account is a subsidiary.
Web Site	URL address for the account.
Account Sales Information	
Account Type	Relationship of the account to your company, such as Prospect, Customer, Partner, or Competitor. **Note:** Accounts designated as a Partner or Competitor appear under the All Competitor and All Partner Accounts lists available from the Account Homepage. They are also included in the list of accounts that you can link to other accounts or opportunities from the Account or Opportunity Detail page. At that point, you can define the exact role that the account plays, such as Reseller, Vendor or Partner, and track the partner and competitor information for every account and opportunity.
Priority	Priority for the account, such as High, Medium or Low.
Industry	Type of business engaged in by the account, such as Manufacturing, High Technology, Financial Services, Retail, Automotive, Pharmaceuticals, Telecommunications, Energy, Services or Other. If you want to view report information, such as opportunities, by Industry, select an Industry for the account and then link the opportunity record to the account.
Public Company	Indication that the account is a publicly owned company.
Region	Region that the account falls under at your company. If you want to view report information, such as opportunities, by Regions, select a Region for the account and then link the opportunity record to the account.
Status	The status of the account. You can use this field to record a status for the account. A number of sample values are provided by default, but your company administrator can add or change values to meet your company's business needs.
Last Call Date	This field is specific to Oracle CRM On Demand Life Sciences Edition.
HIN	Health Industry Number. This field is specific to Oracle CRM On Demand Life Sciences Edition.

Sales

Field	Description
Influence Type	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Call Frequency	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Source Campaign	The campaign that generated the account. If the account is created through the lead conversion process, this field is automatically populated from the Campaign field on the lead record. If the account is created by a user, the user can enter the information in this field.
Annual Revenues	Amount of the company's annual revenue.
Market Segment	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Market Potential	This field is specific to Oracle CRM On Demand Life Sciences Edition.
YTD Revenue	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Market Share	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Reference	Indication that the account can be used as a reference for potential customers or sales representatives to contact.
Reference as of	Date the account becomes a reference.
Account Partner	Indication that this account is a partner.
Number of Physicians	Number of doctors working at a health care site, such as a hospital or clinic. This field is specific to Oracle CRM On Demand Life Sciences Edition.
Route	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Additional Information	
Invoicing and Shipping Addresses	Selecting a country determines the labels for the remaining address fields, according to that country{\f2 '}s address convention. You might see the screen refresh to adjust the field names. If you add a contact and link it to this account, the Invoicing address for the account is carried over to the Account address section for that contact. **NOTE:** If shared addresses are set up for your company, the billing and shipping addresses are read-only, and the address fields change to meet the requirements for shared addresses. For more information on shared addresses, see Addresses.
Owner	The alias of the owner of the account record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. To reassign ownership of an account record, you must have the Read/Edit access level setting for the record. **NOTE:** If group ownership is enabled for your company, then the group team members automatically change if the new owner of the account is a member of a

Field	Description
	different group. The value in the Owner field affects which records are included in the reports that you or your managers run. You can share account records with other users through the Account Team page. For information about sharing records with other users, see Sharing Records (Teams) (on page 134). Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Reassign Account	Indicates that the account should be reassigned. If your company administrator has set up account assignment rules, selecting this field triggers the assignment manager in Oracle CRM On Demand to process the account again and assign it according to the rules. The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. The assignment manager cannot reassign records if the record type is configured in book mode. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47). **NOTE:** The processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned and the current system load. In the case of accounts, the processing time is also affected by the number of team members and the number of contacts and opportunities associated with the record. The owner name changes when the record is reassigned.
Territory	Territory to which this account belongs.
Description	Additional information about the account. This field has a limit of 16,350 characters.

Related Topics

See the following topic for related information:

■ Managing Accounts (on page 267)

Contacts

Use the Contact pages to create, update and track contacts. *Contacts* are individuals with whom your company currently conducts business or expects to conduct business in the future. These individuals can be employees of other companies, independent consultants, vendors or personal acquaintances. A contact is generally associated with an account, and often, an account record includes links to information about several different contacts at that company.

Within Oracle CRM On Demand Financial Services Edition, a contact is often designated as a client to support functionality that is specific to Oracle CRM On Demand Financial Services Edition. Designating a contact as a client indicates that this is a contact with whom your company maintains a long-term relationship so that you can monitor changes in the client's situation and identify opportunities to cross-sell additional products to the client.

Related Topics

See the following topic for related information:

■ Managing Contacts (on page 292)

Working with the Contacts Homepage

The Contacts Homepage is the starting point for managing contacts.

NOTE: Your company administrator can customise the layout of your Contacts Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Contact

You can create a contact by clicking the New button in the My Recently Viewed Contacts section. For more information, see Creating Records (on page 51) and Contact Fields (on page 311).

Working with Contact Lists

The Contact Lists section shows a number of filtered lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for contacts.

Contact List	Filters
All Contacts	No filter is available. This list displays all records to which you have visibility, regardless of the owner.
All Customer Contacts	Contacts where the Type field is set to Customer
Favourite Contacts	This list displays all of the contact records that you added to your favourite records. For information about the Favourite Contacts list, see About the Favourite Contacts List (on page 301).
My Contacts	Contacts with your user name in the Owner field
My Recently Created Contacts	Contacts with your user name in the Owner field, sorted by the created date

Contact List	Filters
My Recently Modified Contacts	Contacts with your user name in the Owner field, sorted by the modified date
Recently Created Contacts	All contacts, sorted by the created date
Recently Modified Contacts	All contacts, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Viewed Contacts

The My Recently Viewed Contacts section shows the contacts that you viewed most recently.

Viewing Favourite Contacts

The Favourite Contacts section shows the names of a maximum of 10 contacts that you added to your favourite records. The order of the contacts in the Favourite Contacts section is determined by the date on which you added the contacts to your favourite records, and not by the date on which the contact records were created. The contacts are listed in descending order by date, with the contact that you most recently added to your favourite records appearing at the top of the list. From the Favourite Contacts section, you can open the full list of your favourite contacts by clicking Show Full List. For information about the Favourite Contacts list, see About the Favourite Contacts List (on page 301).

Working with Contact Tasks

The My Open Contact Related Tasks section shows the tasks assigned to you, sorted by the due date and then by priority. You or your manager set the due date and priority. The task priority, such as 1-High, 2-Medium, or 3-Low, is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority.

NOTE: If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values.

◼ To review a task, click the Subject link.

- To review the contact with which the task is associated, click the contact name.

- To expand the list of tasks, click Show Full List.

Using Reports to Analyse Contacts

One or more report sections might be shown on your Contacts Homepage (your company administrator can specify which report sections are shown on the page). In the standard edition of Oracle CRM On Demand, the Contact Analysis by Account section is shown, which displays contacts by account criteria, such as Region, State/Province, or Industry. For information about using the Contact Analysis by Account section, see Analysing Contacts (on page 306).

Adding Sections to Your Contacts Homepage

If your user role includes the Personalise Homepages privilege, you can add additional sections to your Contacts Homepage, depending on which sections your company administrator has made available for display on your Contacts Homepage.

To add sections to your Contacts Homepage

1 On the Contacts Homepage, click Edit Layout.

2 On the Contacts Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Managing Contacts

To manage contacts, perform the following tasks:

- Importing Your Contacts (on page 294)

- Importing vCard Files (on page 300)

- Saving Contacts as vCard Files (on page 300)

- Linking Contacts to Multiple Accounts (on page 302)

- Tracking Relationships Between Contacts (on page 303)

- Tracking Relationships Between Accounts and Contacts (on page 276)

- Tracking Revenue Based on Contacts (on page 304)

  NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- Adding Referrals (on page 305)

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

■ Tracking Contact Interests (on page 305)

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

■ Analysing Contacts (on page 306)

■ Tracking the Best Calling Times (on page 306)

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

■ Adding Contact State Licences (see "Adding Contact State Licenses" on page 307)

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

■ Tracking Visits (Sales Calls) to Customers (on page 198)

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

■ Blocking Contacts (on page 308)

■ Sending Marketing Emails Using Oracle Eloqua Engage (on page 309)

If your user role includes the Maps Integration privilege, then you can also perform this procedure, Performing Proximity Searches (on page 378).

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

■ Sharing Records (Teams) (on page 134)

■ Using Assessment Scripts (on page 156)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

■ About the Favourite Contacts List (on page 301)

■ Displaying Images on Record Detail Pages (on page 65)

Importing Your Contacts

As a nonadministrator, you can import up to 2000 contacts at a time from a comma-separated value (.csv) file to use with Oracle CRM On Demand.

When you import contacts, you specify how you want Oracle CRM On Demand to handle duplicate records.

Several utilities are available from the Import and Export Tools page, which augment the import and export facilities in Oracle CRM On Demand:

- **Import Assistant.** For more information, see Import Assistant.

- **Oracle Data Loader On Demand.** For more information, see Oracle Data Loader On Demand Client Utility.

- **Oracle Migration Tool On Demand.** For more information, see Oracle Migration Tool On Demand Client Utility.

- **Oracle Web Services.** For more information, see Web Services Integration.

For more information about choosing an appropriate import method, see 1089184.1 (Article ID) on My Oracle Support. For more information on importing and exporting in Oracle CRM On Demand, see Import and Export Tools.

You can also import individual contacts by importing vCard files. For more information, see About vCard Files (on page 298).

NOTE: Company administrators can import up to 30,000 contact records at one time, with a maximum file size of 20 MB.

Before you begin:

- If several employees at your company are importing contacts, co-ordinate the importing effort to minimise record duplication.

- Prepare your file for importing to make sure you capture all the data in the file. At a minimum, your data file must include all required fields. Also, your administrator can configure a field so that it is conditionally required, that is, the field is not required by default, but becomes required if the data in other fields on the record meets certain criteria. If a field becomes required as a result of the condition defined for the field being true, and if your import file does not include a value for the conditionally required field, then the record is rejected. To determine if there are any conditionally required fields configured for the Contact record type, contact your administrator.

CAUTION: You cannot undo the importing of records or perform a mass deletion of records. Therefore, practice the importing procedure with a file of 5 to 10 records to avoid cleaning up data afterwards. If your company is importing a large number of records, attend a training session on importing data. For information on those resources, click the Training and Support global link at the top of each page in Oracle CRM On Demand.

To import your contacts

1   Click the Contacts tab.

2   In the Recently Modified Contacts title bar, click Import.

NOTE: If the Recently Modified Contacts section is not visible on your Contacts Homepage, click the Edit Layout link in the upper right corner of the page and add the Recently Modified Contacts section to your page layout.

3 On the Data and Integration Tools page, in the Personal Import and Export Tools section, click Import Your Contacts.

This starts the import assistant.

4 In Step 1 of the import assistant:

a Select how you want the import assistant to identify matching records.

The import assistant uses an external unique ID, which is a unique external ID field that is imported from another system. The import assistant also uses Oracle CRM On Demand predefined fields.

For information on how duplicate records are defined, see About Record Duplicates and External IDs.

b Select what you want the import assistant to do if it finds a duplicate unique record identifier in Oracle CRM On Demand. Your choices are: not to import duplicate records, to overwrite existing records or to create additional records.

c Select the action you want the import assistant to follow if the imported record's unique record identifier does not match an existing record in Oracle CRM On Demand.

NOTE: If you select Overwrite Records and Don't Create New Record in the previous option, this results in the record being updated.

d Decide if the import assistant should create a new record for missing associations (related records) in your data file.

e Select the date/time format used in the CSV file.

For more information, see Field Type Guidelines for Importing Data.

f Verify that the file encoding selection is Western.

NOTE: Do not change this setting unless you are certain another encoding method is used. The default, Western, applies to most encoding systems in Europe and North America.

g In the Error Logging drop-down list, select what you want Oracle CRM On Demand to log: All messages, Errors and Warnings, or Errors Only.

h Select the type of CSV delimiter used in your file: comma or semi-colon.

i Select the Data file records need to be processed sequentially check box if required.

NOTE: Choosing to process data files sequentially ensures that when an import request is submitted, the child import requests are always processed in sequence. It also ensures that CSV file dependencies are maintained.

j Select the Enable Email Notification check box if you want an email notification to be sent after the import process is complete. This check box is selected by default.

5 In Step 2 of the import assistant:

    a Follow the instructions for validating your file, if necessary.

    b Select a field mapping file, if available.

       Field mapping files (.map) contain the pairing of fields in your CSV file with existing Oracle CRM On Demand fields. After you perform an import, the system sends you an email containing the .map file with the recent mapping scheme. Save it to your computer to re-use it during later imports.

6 In Step 3 of the import assistant, map the fields in your file to Oracle CRM On Demand fields. At a minimum, you must map all required fields to the column headings in the CSV file.

The import assistant lists the column headings from your import CSV file next to a list showing all the fields in that area in Oracle CRM On Demand, including the custom fields that you added.

If the address field you need does not appear in the drop-down list, select the corresponding one shown in this table.

To filter your list on this field	Select this field from the drop-down list
Street Number Address 1 Chome	Number/Street
Ku	Address 2
Floor District	Address 3
Shi/Gun	City
Colonia/Section CEDEX Code Address 4 URB Township	PO Box/Sorting Code
MEX State BRA State Parish Part of Territory Island Prefecture Region Emirate Oblast	Province
Island Code Boite Postale Codigo Postal	Zip/Post Code

If you selected a .map file, verify that the fields map correctly. Any custom fields that you created since you ran the previous import might need to be mapped.

For information about external IDs, see About Record Duplicates and External IDs.

CAUTION: If you have selected the wrong file to import, click Cancel to change selections. At this point, using the Back button does not clear the cache, so the import file you originally selected appears in the field mapping step.

CAUTION: External Unique ID and Manager External ID are key fields that are used to associate Contacts with their Manager Records. If these fields are not mapped, the Manager Record will be associated with Contacts using the Contact Name and Manager fields. When using the Contact Name and Manager fields to do this association, the data file records will be subject to more stringent dependency ordering.

7 In Step 4 of the import assistant, follow the onscreen instructions, if necessary.

8 In Step 5 of the import assistant, click Finish.

To view the queue for your import requests

1 Click the Contacts tab.

2 In the Recently Modified Contacts title bar, click the Import button.

3 On the Data and Integration Tools page, click the Import Request Queue link.

The Import Request Queue page appears with information about your requests, including the estimated time of completion.

The following table describes the import status.

Status	Description
Completed	The import completed with no errors during import.
Completed with Errors	The import completed but there were some errors with some of the records.
Failed	The import completed but none of the records were imported.
Error	The import did not complete because an error occurred.

The following table describes the import record information.

Import Record Information	Description
# Submitted	The number of records contained in the CSV file.
# Processed	The number of records the import engine has currently processed. This field is processed every

Import Record Information	Description
	20 seconds, or as set by a system process.
# Successfully Imported	The number of records that were imported without any problems.
# Partially Imported	The number of records that were imported. Not all records were imported.
# Not imported	The number of records that were not imported at all.

About vCard Files

A *vCard* is a virtual business card that allows users to exchange contact information, such as name, address, phone number, email address, Web site addresses, and photographs. vCard files are often attached to email messages, allowing recipients to quickly add new contact information to a personal address book. The file extension for a vCard file is .vcf.

In Oracle CRM On Demand, you can do the following:

■ Import a vCard file and save the information from the file as a new contact record. For more information, see Importing vCard Files (on page 300).

■ Save an existing contact record in Oracle CRM On Demand as a vCard file. For more information, see Saving Contacts as vCard Files (on page 300).

When you import a vCard file into Oracle CRM On Demand, or when you save an Oracle CRM On Demand contact record as a vCard file, certain information in the contact details is mapped so that it displays correctly in both the vCard and in the Oracle CRM On Demand Contact Detail page.

The following table shows the mappings between the fields in the Contact record type in Oracle CRM On Demand and the vCard properties.

Oracle CRM On Demand Contact Field	vCard Property	vCard Property Parameters
Last Name First Name Middle Name Mr/Ms	N	None
First Name Last Name	FN	None
Work Phone #	TEL	TYPE=voice,work

Oracle CRM On Demand Contact Field	vCard Property	vCard Property Parameters
Home Phone #	TEL	TYPE=voice,home
Cellular Phone #	TEL	TYPE=cell
Work Fax #	TEL	TYPE=fax,work
Email	EMAIL	TYPE=internet
Job Title	TITLE	None
Contact Address Fields	ADR	TYPE=work
Contact Photo	PHOTO	TYPE;ENCODING
Account Name and Department	ORG	None
Description	NOTE	None
Manager	X-MS-MANAGER	None
Assistant Name	X-MS-ASSISTANT	None

Considerations When Importing vCard Files in Oracle CRM On Demand

The following considerations apply when you import vCard files to Oracle CRM On Demand:

■ If the value in a vCard property exceeds the field length that Oracle CRM On Demand supports, then the value is truncated in the contact record in Oracle CRM On Demand. For more information on Oracle CRM On Demand field lengths, see Field Type Guidelines for Importing Data.

■ You can import only the vCard properties that Oracle CRM On Demand supports.

■ If your vCard file contains more than one contact, then only the first contact in the vCard file is imported into Oracle CRM On Demand.

■ You cannot import a Contact image into Oracle CRM On Demand using vCard files.

■ If the corresponding Contact Detail field for a vCard property is read-only in Oracle CRM On Demand, then you cannot import the vCard property.

■ If shared addresses are set up for your company, then the address fields are read-only in Oracle CRM On Demand, and the address properties in the vCard file are not imported into Oracle CRM On Demand.

■ A vCard file property can be imported only if the corresponding field is part of the page layout in Oracle CRM On Demand.

■ You can import only files with the .vcf file extension into Oracle CRM On Demand.

Related Topics

See the following topics for related information:

- About vCard Files (on page 298)
- Importing vCard Files (on page 300)
- Saving Contacts as vCard Files (on page 300)

Importing vCard Files

This topic describes how to import a contact into Oracle CRM On Demand by importing a vCard file from your computer.

NOTE: You can import files only with the .vcf file extension into Oracle CRM On Demand.

To import a vCard file

1 In the Contact Homepage or in any Contact Detail or List page, click Import vCard.

2 In the Import VCard page, click Browse to locate the vCard file that you want to import into Oracle CRM On Demand, and then select it.

3 Click Import vCard.

A new Contact Detail page opens containing the contact details from the vCard file.

4 Click Save.

Related Topics

See the following topics for related information:

- About vCard Files (on page 298)
- Considerations When Importing vCard Files in Oracle CRM On Demand (on page 299)
- Saving Contacts as vCard Files (on page 300)

Saving Contacts as vCard Files

This topic describes how to save a contact from Oracle CRM On Demand as a vCard file.

To save a contact as a vCard file

1 Select the contact that you want to save as a vCard file.

For information on selecting contacts, see Finding Records (on page 68).

2   In the Contact Detail page, click the Save as vCard button on the title bar.

Depending on your browser settings, you might be asked to specify the location where you want to save the vCard file.

Related Topics

See the following topics for related information:

■   About vCard Files (on page 298)

■   Considerations When Importing vCard Files in Oracle CRM On Demand (on page 299)

■   Importing vCard Files (on page 300)

About the Favourite Contacts List

The Favourite Contacts list is a subset of your Favourite Records list. It shows only the contact records that you add to your favourite records. Depending on your company setup and your role setup, the Favourite Contacts list might be available in the following places in Oracle CRM On Demand:

■   The Contact Lists section of the Contacts Homepage.

NOTE: If the Favourite Contacts list is not available by default in the Contact Lists section of the Contacts Homepage, then you might be able to add it to the set of lists that appears in the Contact Lists section. For information about changing sets of lists, see Changing Sets of Lists for Record Types (on page 129).

■   The set of lists in Lookup windows where you search for contacts.

■   The Favourite Contacts section of the Contacts Homepage or My Homepage.

The Favourite Contacts section shows the names of a maximum of 10 contacts that you added to your favourite records. The order of the contacts in the Favourite Contacts section is determined by the date on which you added the contacts to your favourite records, and not by the date on which the contact records were created. The contacts are listed in descending order by date, with the contact that you most recently added to your favourite records appearing at the top of the list. From the Favourite Contacts section, you can open the full list of your favourite contacts by clicking Show Full List.

NOTE: Your administrator determines whether the Favourite Contacts section is available to be displayed on the Contacts Homepage or on My Homepage, or on both. If the Favourite Contacts section is not already displayed on the Contacts Homepage or on My Homepage, then you might be able to add it to the Homepage. For information about personalising your Homepages, see Changing Your Homepage Layouts (on page 865).

When you open the Favourite Contacts list in the Favourite Contacts list page, the list shows the names of your favourite contacts and the dates on which you added the contacts to your favourite records. By default, the list is sorted according to the date on which you added the contacts to your favourite records, with the contact that you most recently added to your favourite records at the top of the list. You can change the sort order of the list and search for records in the list, but you cannot display additional fields in the list or add additional fields as criteria for the list filter.

Any contact that you add to your favourite records appears in your Favourite Records list as well as your Favourite Contacts list. You can have a maximum of 100 records in your Favourite Records list. If there are already 100 records in your Favourite Records list, and if you add another record to your favourite records, then the record that has been in your Favourite Records list for the longest time is dropped from the list to allow the new record to be added. If the record that is dropped from your Favourite Records list is a contact, then that contact no longer appears in your Favourite Records list or in your Favourite Contacts list, even if your Favourite Contacts list contains fewer than 100 records.

The following table describes the tasks that you can perform in the Favourite Contacts list page.

To do this	Follow these steps
Add a new contact	Click New. **NOTE:** When you create a contact from the Favourite Contacts page, the new contact is not automatically added to your Favourite Contacts list. If you want to add the new contact to your Favourite Contacts list, then you must click the Add to Favourites icon in the Detail page for the new contact.
Filter the list	Use the Alpha Search controls and the Quick Filter fields to filter the list to help you find the record you want. For information about using the Alpha Search controls and the Quick Filter fields, see Filtering Lists (on page 123).
Sort the Favourite Contacts list	Click a column heading in the list. By default, the list is sorted according to the date on which you added the contacts to your favourite records, with the contact that you most recently added to your favourite records at the top of the list.
Remove a record from the Favourite Contacts list	In the row for the record that you want to remove, click the Remove link. When you remove a contact from your Favourite Contacts list, the contact is also removed from your Favourite Records list, but the contact is not deleted from Oracle CRM On Demand.
Display details of a favourite contact	Click the name of the contact to display the Contact Detail page for that contact.
Change the set of lists that appears on the record Homepage and in picklists of lists.	For information about changing sets of lists, see Changing Sets of Lists for Record Types (on page 129).

Linking Contacts to Multiple Accounts

You can link a contact to more than one account. To do this task, your Contact Detail Page layout must include the Accounts related information. For information about changing your page layout, see Changing Your Detail Page Layout (on page 855).

For more information about linking records, see Linking Records to Your Selected Record (on page 104).

Tracking Relationships Between Contacts

When you want to track relationships between contacts, store the information in the Contact Relationship pages. For example, you might want to track influential relationships, such as personal relationships, business relationships and industry peers for this contact.

To do so, first link the contact whose relationship you want to track to this contact record. (You can link as many contacts as you want.) Then define the relationship and add any other pertinent information.

NOTE: The tracking relationships feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

NOTE: Company administrators can create custom fields to store additional information about contact relationships and add those custom fields to the Contact Relationship Edit page layout. Then, users who have access to the contact relationship record can view and update the information in the custom fields.

Before you begin. Create a contact record for each person you want to link to the contact.

To track relationships between contacts

1   Select the contact.

For instructions on selecting contacts, see Finding Records (on page 68).

2   On the Contact Detail page, scroll down to the Contact Relationships section and perform one of the following:

- ■   To link a contact, click Add.

- ■   To update information, click the Edit link in the row for the existing contact relationship.

3   On the Contact Relationship Edit page, enter the required information.

The following table describes some fields for tracking relationships between contacts.

Field	Comments
Related Contact	Click the Lookup icon, and select the contact whose relationship and information you want to track. This is a required field.
Role	Select an option that defines the relationship between the contacts. The default values are: None Specified, Child, Lawyer, Spouse, Accountant, Assistant, Investor, Banker, Lived with, Subordinate, Superior, Known Associate, Competitor, Relative, or Agent. Your company administrator can change or add values to the drop-down list.

Field	Comments
Reverse Role	Select an option that defines the reverse relationship between the contacts. The default values are: None Specified, Child, Lawyer, Spouse, Accountant, Assistant, Investor, Banker, Lived with, Subordinate, Superior, Known Associate, Competitor, Relative, or Agent. Your company administrator can change or add values to the drop-down list.
Start Date	The default is today's date. You can use this field to record the start date of the relationship between the contacts.
End Date	Use this field to record the expiration date of the relationship between the contacts.

Tracking Revenue Based on Contacts

You can track revenue information for each of your contacts, which allows your company to base its forecasts on contact revenue. To do so, you add revenue records to contacts.

NOTE: The revenue tracking feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

Adding revenue records to contacts allows you to:

■ Track products, product categories or revenues forecasted for each contact

■ Base your company{\f2 's} forecasts on contact revenue

If your company bases its forecasts on contacts, only records that meet these criteria are included in the forecast:

■ Revenue record for the contact must have a Status of Open, Pending or Closed.

■ Revenue record for the contact must have the Forecast field checked.

■ Revenue record cannot be linked to an opportunity.

Before you begin. Your company needs to inform you of the forecasting method that it wants to use. Companies can forecast revenue on opportunity, opportunity product, account, contact revenue, or product quantity, but only on one of those. The company forecasting method determines which fields you need to fill in when adding revenue records to contacts.

To add revenue to contacts

1 Select the contact.

For instructions on selecting contacts, see Finding Records (on page 68).

2 On the Contact Detail page, scroll down to the Revenues section and perform one of the following:

■ To link a revenue record, click Add.

■ To update revenue information, click the Edit link next to the existing revenue record.

3 On the Revenue Edit page, complete the Revenue Fields, see Tracking Revenue Based on Accounts (on page 282).

NOTE: If your company does not use contact revenue for its forecasts, it is best to leave the Forecast checkbox blank on the Revenue page.

4 Save the record.

Adding Referrals

You can add referrals to your contact record. When you create a new referral, the record is saved as a new lead record.

NOTE: The referrals feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

To add a referral

1 Select the contact.

For instructions on selecting contacts, see Finding Records (on page 68).

2 On the Contact Detail page, scroll down to the Referral section and click New.

3 On the Referral Edit page, enter the required information.

4 Save the record.

The new referral shows a status of Qualifying by default.

Tracking Contact Interests

You can track products, services, or hobbies a contact is interested in, such as mutual funds or golf.

NOTE: The contact interests feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

To track contact interests

1 Select the contact.

For instructions on selecting contacts, see Finding Records (on page 68).

2 On the Contact Detail page, scroll down to the Contact Interests section and click Add.

3 On the Contact Interests page, fill in the required information.

4 Save the record.

Analysing Contacts

The Contact Analysis by Account section of the Contacts Homepage shows a chart that allows users to analyse their total number of contacts by account criteria, such as Region, State/Province, or Industry. With this information, users can see their contact distribution and identify areas of opportunity or weakness.

In this section of the Contacts Homepage, you can place your pointer on the chart to see specific information, click a segment to review a detailed report, or change the categories in the drop-down list to view the same data from another perspective.

Tracking the Best Calling Times

To record and track the best time to call on a contact (typically, a physician or another health care provider), complete the following procedure to add the best calling time. Creating this record allows you to track when a contact is available at a given address.

A contact record can contain zero or more best times to call, and it can have many addresses, each of which might contain zero or more best times to call. A contact call must have at least one address selected, and the information about the best times to call must be available for display to the sales representative for that contact at the selected address.

NOTE: You might need to add the Contact Best Times section to your Contact Detail page or Contact Call Detail page. For information about personalising Detail page layouts, see Changing Your Detail Page Layout (on page 855). If the Contact Best Times section is not available to add to your page layout, then contact your company administrator.

NOTE: The Contact Best Times feature is available only in Oracle CRM On Demand Life Sciences Edition.

To track the best calling time

1 From the Contact Detail page, scroll to the Contact Best Times section and click New.

2 Complete the fields described in the following table.

Field	Description
Day	The planned day of the call, for example, Monday. Use the picklist to select a day. (Required)
Start Time	The planned start time for the call, for example, 11:00 a.m. (Required)
End Time	The planned end time for the call, for example, 1:00 p.m. or 13:00. (Required)
Comments	A description of the call.

Field	Description
Address	The address of the contact. Use the Lookup selector to choose the address. (Required)

3   Save the record.

When you create the best call time for the contact, Oracle CRM On Demand also adds the call time to the Contact Best Times section in the Contact Call Detail page for the contact. You can track, but not create, a best call time record from the Contact Call Detail page.

4   To update the fields for the best call time, click Edit for the best call time record in the Contact Detail page.

You can view the best call time details by clicking the Day field on any record in the Contact Best Times section on the Contact Detail page.

Adding Contact State Licenses

A license to practise medicine is used to validate signatures for samples that are dropped off by a sales representative (for example, a pharmaceutical sales representative) to a contact (for example, a physician). A physician must have a valid medical license for the state in which the physician practises medicine. A *contact state license record* captures the license information for the contact, typically a physician.

To add a state license record for a contact, complete the following procedure.

NOTE: If you do not see the Contact State License related item section in your Contact Detail page, add that related item section as described in Customising Related Item Layouts, or contact your company administrator. This feature is available in Oracle CRM On Demand Life Sciences Edition only.

To add a contact state license

1   From the Contact Detail page, scroll to the Contact State License section, and click New.

2   Complete the fields in the following table and save the record.

Field	Description
Contact	The contact for this state license record, typically a physician or pharmaceutical representative. Use the Book selector to choose a contact.
License Number	The license number for the contact, for example, PS4231732. (Required.)
State	The U.S. state or jurisdiction associated with the license number. Use the picklist list to select the state, for example, *NJ* for New Jersey. **NOTE:** If your jurisdiction is non-U.S., this field is not required.

Field	Description
Expiration Date	The date when the license expires (MM/DD/YYYY), for example, 10/31/2009. Click the calendar icon to select the expiration date.
Status	The status of the license (Active or Inactive). Choose the status using the picklist.

About Blocked Contacts

If your company wants to prevent a contact from receiving any information, samples, or promotional items for all products, then your company administrator can block the contact. When a contact is blocked, you receive an error message when you try to perform any of the following actions:

■ Create a new contact call for the contact

■ Submit an existing contact call record for the contact

  A contact call might be planned or in progress before the contact is blocked. If the contact is blocked before the contact call is submitted, then you cannot submit the contact call.

■ Add the contact as an attendee for an account call

■ Submit an existing account call record if the blocked contact is the primary contact for the account call

  An account call might be planned or in progress before the primary contact for the call is blocked. If the primary contact is blocked before the account call is submitted, then you can submit the account call record only if you specify an alternative primary contact, who is not blocked, for the call.

For information about blocking contacts, see Blocking Contacts (on page 308).

Blocking Contacts

You block a contact by selecting a value in the Blocked Reason Code field on the contact record. The following values are provided for the field by default, but your company can add custom values for the field:

■ **Business.** The contact is blocked from receiving product information and product samples because of a high-level business decision.

■ **Do Not See.** The contact is blocked from receiving product information and product samples because of a business decision that restricts the contact's visibility into all product sets.

■ **Do Not Ship.** The contact is blocked from receiving product information and product samples because of a business decision that does not allow any product to be shipped to the physician.

■ **HR.** The contact is blocked from receiving product information and product samples because of a Human Resources decision that does not allow any product to be shared with the physician.

■ **Legal.** The contact is blocked from receiving product information and product samples because of a legal review of the contact.

For information about adding custom values to a field, see Creating and Editing Fields. For information about what happens when a contact is blocked, see About Blocked Contacts (on page 308).

Before you begin. The Blocked Reason Code field must be present on the Contact Detail page layout for your role. For information about adding fields to page layouts, see Customising Static Page Layouts and Specifying Dynamic Page Layouts.

To block a contact

1   Select the contact that you want to block.

    For information about selecting records, see Finding Records (on page 68).

2   On the Contact Detail page, click Edit.

3   On the Contact Edit page, in the Blocked Reason Code field, select the appropriate code.

4   Save your changes.

About Blocked Products for Contacts

This feature is specific to Oracle CRM On Demand Life Sciences Edition. Your company administrator can specify that a contact is blocked from receiving information, samples, or promotional items for one or more products. You can view the products that are blocked for a contact in a read-only list in the Blocked Products related information section of the Contact Detail page. You cannot add, update, remove, or delete blocked product records in the Blocked Products related information section of the Contact Detail page.

NOTE: If the Blocked Products related information section is not visible on your Contact Detail page, then click the Edit Layout link in the upper-right corner of the page, and add the section to your page layout. If the section is not available to add to your page layout, then contact your company administrator.

For more information about blocking products for contacts, see Blocked Products (on page 732).

Sending Marketing Emails Using Oracle Eloqua Engage

As a sales representative, you can send marketing emails to your customer contacts and leads, both individually or in lists, using Oracle Eloqua Marketing Cloud Service and its add-on product, Oracle Eloqua Engage. Because the email is sent through Oracle Eloqua Engage, you can track the email and use it in lead scoring and qualification, and to see whether the recipient has opened the email. For information on Oracle Eloqua Engage, see the Oracle Eloqua Marketing Cloud Service Web site http://www.oracle.com/us/corporate/features/marketing-automation/index.html.

NOTE: Your company must purchase the required licences to use Oracle Eloqua Marketing Cloud Service and Oracle Eloqua Engage. Oracle Eloqua Marketing Cloud Service and Oracle Eloqua Engage are both separately licensed products from Oracle CRM On Demand.

Oracle CRM On Demand does not send any email addresses to Oracle Eloqua Engage for any contact or lead that has the Never Email check box selected on the Contact or Lead Detail page. Any new contact or lead that you create in Oracle CRM On Demand can receive a marketing email from Oracle Eloqua Engage after it is synchronised with Oracle Eloqua Marketing Cloud Service. Oracle Eloqua Engage respects any opt-out settings

that you have applied for the contact or lead, such as unsubscribing a contact from receiving marketing emails or similar communications. The contact or lead receives email communications only if you have cleared the Never Email setting in Oracle CRM On Demand and that contact or lead has opted in or subscribed to email communications as recorded in Oracle Eloqua Marketing Cloud Service.

Limitations on the Number of Emails You Can Send From a List

There are limits to the number of emails that you can send at one time. When Oracle CRM On Demand sends emails from a list, the number of emails that it sends is limited to the number of records displayed on the current page you are viewing in Oracle CRM On Demand. If your list is set to display 25 rows but there are 100 records in the entire list, then when you click Send Email via Engage, Oracle CRM On Demand sends 25 records as that is what is displayed on the current page. In addition, browsers limit the length of the parameter that Oracle CRM On Demand can pass to Oracle Eloqua Engage in the URL to 2048 characters. If the list of addresses in the URL contains exceeds 2048 characters, you receive an error message asking you to reduce the number of records in the list. For the Microsoft Internet Explorer browser, the total URL length is limited to 2000 characters. Assuming an average email length of 25 characters, it is recommended that you send no more than 40 emails at one time to avoid these browser limitations. As a best practice, send a maximum of 25 emails at one time from a list.

Before you begin. Your user role must include the Oracle Eloqua Marketing Cloud Service Integration privilege. If this privilege is not enabled for your role, then contact Oracle CRM On Demand Customer Care. In addition, your administrator must configure the email delivery as described in Configuring Email Delivery Using Oracle Eloqua Engage. You must also have your sign in credentials such as Company, Username and Password set up for Oracle Eloqua Engage.

To send marketing emails using Oracle Eloqua Engage

1 Navigate to a Contact Detail, Contact List, Lead Detail or Lead List page.

2 At the top of the Detail or List page, click Send Email via Engage.

   If you select the Never Email check box on a Contact or Lead Detail page, then when you click Send Email via Engage from the Detail page, you receive a message that the Never Email field is selected and that the contact or lead will not receive the email. If you click Send Email via Engage from a List page, then you receive this message only if all the records in the Contact List or Lead List have the Never Email check box selected.

   If you have not populated the Email field on a Contact or Lead Detail page, then when you click Send Email via Engage from the Detail page, you receive a warning message that the Email field must be populated to continue. If you click Send Email via Engage from a List page, then Oracle CRM On Demand sends only the records in the Contact List or Lead List that have the Email field set to Oracle Eloqua Engage.

3 In the sign in screen for Oracle Eloqua Engage, enter your credentials, and click Sign In

   TIP: Click Remember me to avoid entering your credentials each time you access Oracle Eloqua Engage.

4 Select the template name for your marketing email from the Select template window.

   Oracle Eloqua Engage inserts the email addresses for the contacts or leads that have the Email field populated in Oracle CRM On Demand into the To: field of the email.

5 Review the content of the email in the Engage window, and personalise its content as required.

6 To send the email, click Send in the Engage window.

Related Topics

See the following topics for related information about marketing emails:

- Configuring Email Delivery Using Oracle Eloqua Engage

- Oracle Eloqua Marketing Cloud Service Web site
  http://www.oracle.com/us/corporate/features/marketing-automation/index.html

Contact Fields

Use the Contact Edit page to add a contact or update details for an existing contact. The Contact Edit page shows the complete set of fields for a contact.

TIP: You can also edit contact information on the Contact List page and the Contact Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information that you see on-screen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Contact Information	
Account	Account to which the contact is linked.
	NOTE: It is possible to link a contact to more than one account; see Linking Contacts to Multiple Accounts (on page 302) for more information.
Email	The email address of the contact. For information about the characters that are supported for use in email addresses, see About Special Characters in Email Addresses (on page 64).
Opt In	Used in the U.S. and Europe to indicate that a customer has explicitly chosen to participate in either their information-sharing or marketing communications.
Opt Out	Used in the U.S. and Europe to indicate that a customer has explicitly chosen *not* to allow their information to be shared or has chosen not to receive marketing communications.
Contact Detail Information	

Field	Description
Contact Type	The type of contact, such as Prospect, Qualified Lead, Customer, Partner, Client, and Competitor. The Client value is specific to Oracle CRM On Demand Financial Services Edition. **NOTE:** If you select the Client value in this field, then the Client Since Date field is automatically populated with the current date.
Department	Name of the department of the contact.
Manager	Name of the manager of the contact.
Lead Source	Lead source of the contact, such as Advertisement, Direct Mail, Email, Web Site, and Other.
Source Campaign	The campaign that generated the contact. If the contact is created through the lead conversion process, this field is automatically populated from the Campaign field on the lead record. If the contact is created by a user, the user can enter the information in this field.
Assistant Name	Name of the contact's assistant.
Assistant Phone #	Phone number of the contact's assistant.
Private	Indicates that the contact is private and cannot be viewed by other users.
Never Email	Indicates that the contact does not want to receive email.
Degree	Default values are PHD, M.D., D.O., MBA, RN, R.T., Reg. Pharmacist, Master of Science, Dentist, LPN and Master of Public Health. This field is specific to Oracle CRM On Demand Life Sciences Edition.
Market Potential	Default values are High, Medium and Low. This field is specific to Oracle CRM On Demand Life Sciences Edition.
Call Frequency	Default values are No See, 1-2 Times/Year, 3-4 Times/Year and >5 Times/Year. This field is specific to Oracle CRM On Demand Life Sciences Edition.
YTD Sales	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Route	Default values are Route 1, Route 2, Route 3 and Route 4. This field is specific to Oracle CRM On Demand Life Sciences Edition.
Blocked Reason Code	A value in this field indicates that the contact is blocked from receiving any information, samples, or promotional items for all products. For more information about the contact-blocking functionality, see About Blocked Contacts (on page 308) and Blocking Contacts (on page 308).
Last Call Date	This field is specific to Oracle CRM On Demand Life Sciences Edition.

Field	Description
Best Time to Call	Indicates the best time of day to reach a contact. Default values are Early afternoon, Early morning, Evening, Late afternoon, Mid-morning and Saturday. This field is specific to Oracle CRM On Demand Life Sciences Edition.
Additional Information	
Account Address fields	Primary address. Inherited from the account linked to the contact. Read only.
Contact address fields	Alternate address of the contact. **NOTE:** If shared addresses are set up for your company, then the contact addresses are read-only, and the address fields change to meet the requirements for shared addresses. Other users in your company can view the shared address data for private contacts. For more information about shared addresses, see Addresses.
Owner	The alias of the owner of the contact record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. The value in the Owner field affects which records are included in the reports that you or your managers run. You can share contact records with other users through the Contact Team or Account team pages. For information about sharing records with other users, see Sharing Records (Teams) (on page 134). Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Description	Additional information about the contact. This field has a limit of 16,350 characters.
Available Section	
Current Investment Mix	Default values are Aggressive, Moderate and Conservative. This field is specific to Oracle CRM On Demand Financial Services Edition.
Objective	Default values are Capital Preservation, Income, Income/Growth, Balanced, Growth, Aggressive Growth and International Diversification. This field is specific to Oracle CRM On Demand Financial Services Edition.
Segment	Default values are White Collar, Blue Collar, Rural/Farming, Mass Retail, Mass Affluent, High Net Worth, Pentamillionaires and Ultra High Net Worth.

Field	Description
	This field is specific to Oracle CRM On Demand Financial Services Edition.
Experience Level	Default values are None, Limited, Good and Extensive. This field is specific to Oracle CRM On Demand Financial Services Edition.
Risk Profile	Default values are Conservative, Moderate, and Aggressive. This field is specific to Oracle CRM On Demand Financial Services Edition.
Primary Goal	Default values are Saving for child's education, Saving for College, New Home, Accumulating wealth, Estate planning, Preserving my assets and Retirement. This field is specific to Oracle CRM On Demand Financial Services Edition.
Life Event	Default values are Marriage, Birth of Child, Retirement, Divorce and Other. This field is specific to Oracle CRM On Demand Financial Services Edition.
Investment Horizon	Default values are Short term, Medium term and Long term. This field is specific to Oracle CRM On Demand Financial Services Edition.
Tier	Default values are Gold, Silver, Bronze, Top 100, Top, Medium and Low. This field is specific to Oracle CRM On Demand Financial Services Edition.
Total Liabilities	This field is specific to Oracle CRM On Demand Financial Services Edition.
Total Net Worth	This field is specific to Oracle CRM On Demand Financial Services Edition.
Total Income	This field is specific to Oracle CRM On Demand Financial Services Edition.
Total Assets	This field is specific to Oracle CRM On Demand Financial Services Edition.
Total Expenses	This field is specific to Oracle CRM On Demand Financial Services Edition.
Credit Score	This field is specific Oracle CRM On Demand Financial Services Edition.
Marital Status	Default values are Single, Divorced, Married, Partner, Separated, Widowed and Widower. This field is specific to Oracle CRM On Demand Financial Services Edition.
Own or Rent	Default values are Own or Rent. This field is specific to Oracle CRM On Demand Financial Services Edition.
Home Value	This field is specific to Oracle CRM On Demand Financial Services Edition.
Date of Birth	This field is specific to Oracle CRM On Demand Financial Services Edition.
Tax Bracket	This field is specific to Oracle CRM On Demand Financial Services Edition.
Customer ID	This field is specific to Oracle CRM On Demand Financial Services Edition.
Gender	Default values are F and M. This field is specific to Oracle CRM On Demand Financial Services Edition.
Self-Employed	This field is specific to Oracle CRM On Demand Financial Services Edition.

Field	Description
Client Since Date	Automatically populated with the current date when the Contact Type is set to Client. This field is specific to Oracle CRM On Demand Financial Services Edition.
Referred By	The person who referred the contact. This field is specific to Oracle CRM On Demand Financial Services Edition.
Qualified Date	Automatically populated with the current date when the client is qualified. This field is specific to Oracle CRM On Demand Financial Services Edition.
Status	Status of the Contact. Default values are Active, Quiet Filed, or Dead Filed. This field is specific to Oracle CRM On Demand Financial Services Edition.
Profession	The client's profession. This field is specific to Oracle CRM On Demand Financial Services Edition.

Opportunities

Use the Opportunity pages to create, update, and track opportunities. *Opportunities* are potential sales deals that, at some point, might be included in revenue forecasting.

You can create an opportunity by converting a qualified lead to an opportunity, or you can create a new opportunity for an existing account or contact.

Opportunity records help you to manage your sales pipeline as you work to close deals. All of your opportunity information is visible in one place and is linked to related lead, contact, and account information. This information gives you a complete picture of your opportunity and your customer.

About Opportunities and Forecasts

An *opportunity* is a potential revenue-generating transaction that can be included in your sales forecast when it reaches a specific point in your sales process. For an opportunity or product revenue record to be considered for inclusion in a forecast, the record must have a close date within the forecast period and be owned by a forecast participant. The forecast periods and participants are determined as part of the forecast definition. For more information about forecasts, see Forecasts (on page 338).

NOTE: Your company can set up different sales processes for different roles and different opportunity types. The sales process based on the opportunity type overrides the default sales process based on your user role. When you create an opportunity, the default sales process for your user role is assigned to the opportunity. If you select an opportunity type that has an assigned sales process, then the sales process for the opportunity is determined by the opportunity type you selected.

Tips for Managing Your Opportunity Records

Updating your opportunity information as you work to close a deal facilitates clear team communication and ensures accurate forecasts and reports. It is particularly important to keep certain fields on the Opportunity Detail page up to date:

■ The Revenue, Close Date, and Sales Stage fields are critical for tracking pipeline history and are used for trend analyses and forecasting.

■ If your company bases its forecasts on opportunities, select the Forecast check box on an opportunity record to add the opportunity to your forecasted revenue at the appropriate time in the sales process. If your company bases its forecasts on products, select the Forecast check box on your linked products instead.

Sales Stages

Every sales process is defined by specific stages. Each sales stage has certain activities and deliverables, or tasks that must be completed before the opportunity is advanced to the next sales stage. As you work on an opportunity, you evaluate it against clearly defined criteria for each stage in your company's sales cycle.

■ As criteria are met, update the Sales Stage field in your opportunity record.

■ The Probability percentage field on the opportunity record displays a value related to the selected sales stage for the opportunity by default. You can change this value, if needed, to better reflect your particular opportunity while it is in that sales stage. However, when the sales stage changes, the value in the Probability percentage field is automatically updated to the default probability value for the new sales stage, unless the Mass Update feature is used to change the sales stage. If you use the Mass Update feature to change the value in the Sales Stage field on one or more records, then the value in the Probability percentage field on the records is not updated to the default probability percentage for the new sales stage.

■ The Expected Revenue field displays a currency value that is calculated based on the Revenue field multiplied by the value in the Probability percentage field. This figure is used for forecasting.

■ Update the Next Step field to reflect the criteria for the next stage in the sales cycle.

About Sales Stages in Searches and List Filters

The sales stages that you can select in search criteria and list filters are determined as follows:

■ In a targeted search of the Opportunity record type in the Action bar, if the Sales Stage field is available as a search field, then you can select only the sales stages that are associated with the sales process that is specified for your user role, or the sales stages for the default sales process, if no sales process is specified for your role. The available sales stages are not limited by the opportunity type, even if the Opportunity Type field is available as a search field in the Action bar, and you select an opportunity type for the search.

■ In an advanced search of the Opportunity record type, you can select any of the sales stages that exist in Oracle CRM On Demand as filter values for the Sales Stage field. The available filter values are not limited to the sales stages for a specific sales process, even if a default sales process is specified for your role, or you select an opportunity type as a filter for the search.

■ When setting up a list filter for the Opportunity record type, you can select any of the sales stages that exist in Oracle CRM On Demand as filter values for the Sales Stage field. The available filter values are not

limited to the sales stages for a specific sales process, even if a default sales process is specified for your role, or you select an opportunity type as a filter for the list.

Forecasting

When Oracle CRM On Demand generates forecasts, it determines which records, fields, and data to include according to your forecasting method. If certain conditions are met, it includes these records in the forecasts:

■ **Close Date.** Oracle CRM On Demand verifies that the close date for the opportunity or product revenue record falls within the forecast period:

   ■ If your company's forecasts are based on opportunity revenue, the opportunity record (either alone or linked to products) must show a close date that falls within the forecast period.

   ■ If your company's forecasts are based on product revenue, the product revenue record must show a close date that falls within the forecast period.

■ **Expected Revenue.** Oracle CRM On Demand calculates the expected revenue forecast data, as follows:

   Calculates the total for the Expected Revenue fields in either the opportunity or product revenue records and displays the sum in the Expected Revenue field in the Forecast record.

   NOTE: For the opportunity expected revenue to accurately reflect expected revenue based on opportunity products, the Product Probability Averaging Enabled option must be selected on the company profile. Enabling the averaging functionality for the product probability ensures that the probability percentage (as recorded in the Probability % field) for each product revenue record is included as part of the calculation. Also, unless the Enable Automatic Update of Opportunity Totals option is selected on the company profile, you must click the Update Opportunity Totals button to update the expected revenue of the opportunity. For more information about updating opportunity totals, see Linking Products to Opportunities (on page 324).

■ **Pipeline.** Oracle CRM On Demand calculates the pipeline forecast data, as follows: it calculates the total for the Revenue fields in either the opportunity or product revenue records for all prospective deals within the forecast period, regardless of the status, and displays the sum in the Pipeline field in the forecast record.

   NOTE: For recurring product revenues, only the revenue amount that pertains to the forecast period is included, not the total product revenue.

■ **Forecast.** Oracle CRM On Demand retrieves the Revenue field data from records with the Forecast check box selected and displays the sum in the Forecast field in the forecast record:

   ■ If your company bases its forecasts on opportunities, opportunity records with the Forecast check box selected are included.

   ■ If your company bases its forecasts on products, product revenue records with the Forecast check box selected are included.

      NOTE: The Forecast flag indicates that there is a high probability that the opportunity will close. So, when this flag is selected, the corresponding revenue is included in your forecasted revenue totals.

      The Forecast flag does not determine whether an opportunity or product revenue record is part of your overall forecast record.

■ **Closed Revenue.** Oracle CRM On Demand retrieves Revenue field data from records with a sales stage of Closed-Won and displays the total in the Closed Revenue field of the Forecast record:

■ If your company bases its forecasts on opportunities, opportunity records with a close date within the forecast period are included.

■ If your company bases its forecasts on products, product revenue records with a start/close date within the forecast period are included.

NOTE: For recurring product revenues, only the revenue amount that pertains to the forecast period is included, not the total product revenue.

Working with the Opportunity Homepage

The Opportunity Homepage is the starting point for managing opportunities.

NOTE: Your company administrator can customise the layout of your Opportunity Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating an Opportunity

You can create an opportunity by clicking the New button in the Recently Viewed Opportunities section. For more information, see Creating Records (on page 51) and Opportunity Fields (on page 335).

Working with Opportunity Lists

The Opportunity Lists section shows a number of filtered lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for opportunities.

Opportunity List	Filters
All Opportunities	All opportunities to which you have visibility
All Closed Opportunities	The opportunities where the Sales Stage field is set to Closed/Won
All Large Opportunities	The opportunities where the revenue is greater than 100,000
Recently Created Opportunities	All opportunities to which you have visibility, sorted by the created date
Recently Modified Opportunities	All opportunities to which you have visibility, sorted by the modified date
My Forecast Opportunities	The opportunities where the Forecast check box is selected

Opportunity List	Filters
My Opportunities	The opportunities where your name is in the Owner field
My Top Opportunities	The opportunities that you own where the Priority field is set to High
My Recently Created Opportunities	All opportunities that you created, sorted by the created date
My Recently Modified Opportunities	All opportunities that you modified, sorted by the created date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Viewed Opportunities

The My Recently Viewed Opportunities section shows the opportunities that you viewed most recently.

Working with Opportunity Tasks

The My Open Opportunity Related Tasks section shows the tasks assigned to you, sorted by the due date and then by priority. You or your manager set the due date or priority. The task priority, such as 1-High, 2-Medium, or 3-Low, is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority.

NOTE: If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values.

■ To review a task, click the Subject link.

■ To review the opportunity with which the task is associated, click the opportunity name.

■ To expand the list of tasks, click Show Full List.

Using Reports to Analyse the Pipeline

One or more report sections might be shown on your Opportunity Homepage. Your company administrator can specify which report sections are shown on the page. In the standard edition of Oracle CRM On Demand, the Pipeline Analysis for Current Quarter section is shown, which displays a quarterly analysis of the pipeline in chart format. For information about using the Pipeline Analysis for Current Quarter section, see Analysing the Pipeline (on page 329).

Adding Sections to Your Opportunity Homepage

If your user role includes the Personalise Homepages privilege, you can add more sections to your Opportunity Homepage, depending on which sections your company administrator has made available for display on your Opportunity Homepage.

To add sections to your Opportunity Homepage

1 On the Opportunity Homepage, click Edit Layout.

2 On the Opportunity Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page. Then click Save.

Managing Opportunities

To manage opportunities, do the following tasks:

- Reassigning Opportunities (on page 321)
- Tracking Partners and Competitors of Opportunities (on page 322)
- Accessing the Sales Process Coach (on page 323)
- Linking Products to Opportunities (on page 324) (allows tracking of product revenue)
- Analysing the Pipeline (on page 329)
- Creating a Special Pricing Request from an Opportunity (on page 330)
- Specifying Parent and Child Opportunities (on page 330)
- Creating a Deal Registration from an Opportunity (on page 332)
- Splitting Opportunity Revenue Among Team Members (on page 332)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 103)
- Linking Records to Your Selected Record (on page 104)
- Working with Lists (on page 112)
- Sharing Records (Teams) (on page 134)

■ Using Assessment Scripts (on page 156)

■ Viewing Audit Trails for Records (on page 164)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

■ About Sales Stages and the Mass Update Feature (on page 334)

■ Working with Oracle Social Network (on page 467)

Reassigning Opportunities

If your access levels permit you to do so, you can manually reassign an opportunity by changing the owner or primary custom book on the opportunity record.

NOTE: Depending on the record ownership mode that your company administrator configures for the Opportunity record type, you can assign an opportunity record to an owner or to a primary custom book; however, you cannot assign an opportunity record to both an owner and a primary custom book. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

If your company uses the assignment manager and the Opportunity record type is configured for the user mode or mixed mode of record ownership, then you can also reassign an opportunity to a new owner by selecting the Reassign Opportunity check box on the request.

To reassign an opportunity

1 Select the opportunity that you want to reassign.

For instructions on selecting opportunities, see Finding Records (on page 68).

2 On the Opportunity Detail page, click Edit.

3 On the Opportunity Edit page, do one of the following:

■ In the Owner field or the Book field, click the Lookup icon, and then select another user or book in the Lookup window.

■ Select the Reassign Opportunity check box to trigger the assignment manager to reassign the opportunity.

NOTE: The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. The assignment manager cannot reassign records if the record type is configured in book mode. For more information

about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

4 Save your changes.

NOTE: The processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned and current system load.

Tracking Partners and Competitors of Opportunities

Oracle CRM On Demand provides areas where you can track information about partners or competitors of your opportunities. For example, you might want to track the companies (accounts) with which you do business for Opportunity XYZ or the companies (accounts) against which you compete for Opportunity XYZ.

To do so, first link the account acting as your partner or competitor to the opportunity record. (You can link as many partner or competitor accounts as you want.) Then add information to the Opportunity Partner or Competitor Edit page about the partner or competitor, such as its strengths and weaknesses.

Before you begin. Create an account record for each partner or competitor you want to link to your opportunity. For information on adding records, see Creating Records (on page 51).

To track partner and competitor information of opportunities

1 Select the opportunity.

For instructions on selecting opportunities, see Finding Records (on page 68).

2 On the Opportunity Detail page, scroll to the Opportunity Partners or Opportunity Competitors section and do one of the following:

- ■ To link an account, click Add.

- ■ To update information, click the Edit link next to the existing partner or competitor.

3 On the Opportunity Partner or Opportunity Competitor Edit page, enter the required information.

The following table describes some field information for tracking partner or competitor information.

Field	Comments
Opportunity Partner	Click the Lookup icon, and select the account whose relationship and information you want to track as your partner with this opportunity. This is a required field.
Opportunity Competitor	Click the Lookup icon, and select the account whose relationship and information you want to track as your competitor for this opportunity. This is a required field.
Role	Select an option that defines the relationship between your opportunity and this account.

Field	Comments
Reverse Role	Select the option that defines the reverse relationship or role.
Start Date	Use this field to record the start date of a partnership. The default is today's date. This is a required field.
End Date	Use this field to record the expiration date of a partnership.
Primary Contact	Key partner or competitor contact for this opportunity.

4 Save the record.

Accessing the Sales Process Coach

At each sales stage of an opportunity, your company might need to collect specific information, according to their business practises. To guide you in completing the information, your company administrator can set up follow-up tasks, require that you fill in specific information, and add information for you to review at each phase of the sales process.

Note: Your company can set up different sales processes (stages, probabilities, and coaching information) for different roles and different opportunity types. For example, if some sales representatives sell products while others sell services, they might be linked to different roles and, as a result, see different options for sales stages and different guidelines in the sales process coach.

To access the coach information relating to the sales stages

1 Select the opportunity.

For instructions on selecting opportunities, see Finding Records (on page 68).

2 On the Opportunity Detail page, click the Coach button.

3 Review the Process Coach page for information that your company administrator set up, and update the opportunity record accordingly.

TIP: You can print the information by right-clicking on the Process Coach page.

NOTE: In the Useful Resources section, click View in the row of any attachment for further information.

4 To update the opportunity, click Edit and revise the record information to meet the coach instructions.

5 Save the opportunity record.

6 When you update the Sales Stage field, the application prompts you to fill in required fields. Also, some fields might default to certain values, but you can update those.

7 Click Close in the Process Coach window.

If your company administrator has set it up, some tasks are added to this opportunity and this opportunity's linked account when you save the record.

Related Topics

See the following topic for related information:

■ Setting Up Sales Processes, Categories, and Coaches

Linking Products to Opportunities

You can link products to opportunities to:

■ Track which products belong to the opportunity

■ Calculate opportunity revenue based on product revenue

■ Base your company's forecasts on product revenue and product quantities

You can also link a product to an opportunity when you create the opportunity. If your company administrator has enabled the Save and Add Product button on the Opportunity Edit page, you can click the Save and Add Product button to save the new opportunity record and navigate directly to the Product Revenue Edit page. If you cancel adding the product revenue record, then Oracle CRM On Demand displays the Opportunity Detail page for the previously saved opportunity record.

If your user role includes the Mass Update privilege, then you can use the mass update feature to update the values in a group of product revenue records linked to an opportunity at the same time. The Mass Update button is available in the Opportunity Product Revenues section of the Opportunity Detail page and is also available in the Opportunity Product Revenue List page, which opens when you click the Show Full List link in the Opportunity Product Revenues section of the Opportunity Detail page.

About Updating Opportunity Totals

Depending on your company setup, the revenue and expected revenue on an opportunity might be automatically updated when you update the products that are linked to the opportunity. If your administrator selects the Enable Automatic Update of Opportunity Totals option on the company profile, then the revenue and expected revenue on an opportunity are automatically updated whenever you make a change to a product that is linked to that opportunity. Similarly, the revenue and expected revenue on an opportunity are automatically updated when you link a product to the opportunity, or remove a product from the opportunity.

If your administrator does not select the Enable Automatic Update of Opportunity Totals option on the company profile, then the revenue and expected revenue on an opportunity are not automatically updated when you update the products that are linked to the opportunity. Instead, the Update Opportunity Totals button is available in the title bar of the Opportunity Product Revenues related information section in the Opportunity Detail page. To update the revenue and expected revenue on the opportunity after you make a change to any of the products that are linked to an opportunity, you must click the Update Opportunity Totals button.

For the Update Opportunity Totals button to work correctly, the Quantity and Revenue fields on the Product Revenue Edit page must be displayed and populated. Your administrator can customise your page layout to make these fields available.

About Product Probability Averaging

When the opportunity revenue is calculated, the calculation that is performed depends on whether the Product Probability Averaging Enabled option is enabled on the company profile, as follows:

■ If the Product Probability Averaging Enabled option is selected, then Oracle CRM On Demand uses each linked product to update the Revenue field and the Probability percentage field on the opportunity. Therefore, the Expected Revenue is calculated using the average probability for all linked products.

■ If the Product Probability Averaging Enabled option is not selected on the company profile, then Oracle CRM On Demand uses the total product revenue for each linked product to update the Revenue field on the opportunity. The value in the Probability percentage field on the opportunity is not updated. Therefore, the Expected Revenue is calculated using the existing percentage in the Probability percentage field on the opportunity.

NOTE: The method of calculating the Expected Revenue is the same regardless of the setting of the Enable Automatic Update of Opportunity Totals check box on the company profile.

Before you begin:

■ Your company needs to inform you of the forecasting method it wants to use. The company forecasting method determines which fields you must select when linking products to your opportunities.

■ To update a group of opportunity product revenue records, your user role must include the Mass Update privilege.

To link products to opportunities

1 Select the opportunity.

For instructions on selecting opportunities, see Finding Records (on page 68).

2 On the Opportunity Detail page, scroll down to the Opportunity Product Revenues section and do one of the following:

■ To link a product, click Add.

■ To update product information, click the Edit link next to the existing product.

3 On the Opportunity Product Revenue Edit page, fill in the Quantity, Purchase Price, and Close Date fields.

4 If the product represents recurring revenue, fill in the Frequency and # of Periods fields in the Recurring Revenue Information section.

5 If your company forecasts revenue based on product revenue, and you want to include this product revenue record as part of your forecasted revenue totals, or your forecasted quantities, or both, select the Forecast check box.

NOTE: If your company forecasts revenue, based on opportunities, rather than products, it is best not to select the Forecast check box on the Opportunity Product Revenue record.

6 Save the record.

To calculate opportunity revenue based on linked product revenue

1   Select the opportunity.

For instructions on selecting opportunities, see Finding Records (on page 68).

2   On the Opportunity Detail page, scroll to the Product Revenues section and do one of the following:

-   To link a product, click Add.

-   To update product information, click the Edit link next to the existing product. (If inline editing is enabled, you can edit the Product Revenues fields inline on the Opportunity Detail page; for more information about editing fields in related information sections, see Updating Linked Records from Main Records (on page 111).)

3   On the Opportunity Product Revenue Edit page, fill in the Quantity, Purchase Price, and Start/Close Date fields.

4   If the product represents recurring revenue, fill in the Frequency and # of Periods fields in the Recurring Revenue Information section.

5   Save the record.

6   If the Update Opportunity Totals button is available in the Opportunity Product Revenue section of the Opportunity Detail page, then click Update Opportunity Totals to update the opportunity totals.

This totals the product revenue for each linked product and displays it in the Revenue and Expected Revenue fields for the Opportunity.

To base your company's forecasts on product revenue records

1   Select the opportunity.

For information on selecting opportunities, see Finding Records (on page 68).

2   On the Opportunity Detail page, scroll to the Opportunity Product Revenues section, and do one of the following:

-   To link a product, click Add.

-   To update product information, click Edit. (If inline editing is enabled, you can edit the Opportunity Product Revenues fields inline on the Opportunity Detail page. For more information about editing fields in related information sections, see Updating Linked Records from Main Records (on page 111).)

3   On the Opportunity Product Revenue Edit page:

a   Fill in the Quantity, Purchase Price, and Start/Close Date fields.

b   Make sure that the date in the Start/Close Date field falls within the forecast period, and that the record is owned by a forecast participant.

c   Select the Forecast check box to indicate that you want this record information to contribute to your forecast revenue totals.

    d   If the product represents recurring revenue, fill in the Frequency and # of Periods fields in the Recurring Revenue Information section.

4   Save the record.

    NOTE: If a product is not sold, you can update the associated Start/Close date and deselect the Forecast check box on the Product Revenue page for that product to prevent the revenue for the product from being added to your company's forecasts. Alternatively, if one of several products linked to the opportunity is on hold, you can remove the product from the opportunity, and create another opportunity for that product to prevent its revenue from being included in the forecast.

To update a group of opportunity product revenue records

1   In the Opportunity Detail page, scroll to the Opportunity Product Revenues section, and do one of the following:

■   If you want to update only the records that are currently displayed in the Opportunity Product Revenues section, then click Mass Update.

■   If you want to update more records than are currently displayed in the Opportunity Product Revenues section, click Show Full List to open the list of opportunity product revenue records, and then click Mass Update in the Opportunity Product Revenue List page.

    NOTE: When you click Mass Update in the Opportunity Product Revenue List page, only the records that are displayed in the Opportunity Product Revenue List page are available for you to update. For example, if you display only 10 records in the Opportunity Product Revenue List page, then only those 10 records are available for you to update. You can display a maximum of 100 records in the Opportunity Product Revenue List page. If there are more than 100 records in the list, then you can repeat the task until all of the records are updated.

2   In Step 1, clear the check box for the records you do not want to update, and then click Next.

3   In Step 2, select the fields that you want to update, and enter new values for those fields.

    You can select up to five fields to be updated to new values. To remove existing values from a field, leave the Value column blank in Step 2.

4   Click Finish.

Opportunity Product Revenue Fields

The following table describes field information for product revenue. Your administrator can add, relabel or delete fields, so the fields that you see might differ from those in this table.

CAUTION: If your company bases its forecasts on products, the information that you enter for product revenue can affect its calculations.

Field	Description
Key Product Information	

Field	Description
Product Name	Only products marked Orderable by your company administrator can be selected. When you link a product to this opportunity, these fields are copied from the product definition: Product Category, Part #, Type, Status and Description.
Quantity	Number of units the customer orders. For a recurring product, enter the quantity of the product for each recurring period. For example, if you send 10 printer cartridges each month, enter 10 here.
Purchase Price	Product price.
Revenue	The quantity multiplied by the purchase price. The revenue cannot be overwritten. This field affects the forecasts for opportunity products.
Product Category	Category carried over with the product definition. Read-only.
Part #	Number carried over with the product definition. Read-only.
Type	Type carried over with the product definition. Read-only.
Status	Status carried over with the product definition. Read-only.
Description	Additional information about the product. Limit of 250 characters.
Recurring Revenue Information	
Start/Close Date	This date is carried over from the close date on the opportunity. For the product revenue item, this date is the expected close date. For a recurring product, this date is the start date. For a recurring product with a close date that ends on the last day of the month and a start date of mid-month, add one record for the full recurring price and another record for the pro rata order. For example: You start supplying paper to a company on May 15th. After that, you will be sending $500 worth of paper at the end of each month until the end of the year. For the mid-month order, add a product record with the following values: Revenue = $250 Quantity = 1 For the recurring order, add a second product record with the following values: Revenue = $500 Quantity = 1 Frequency = Monthly #of Periods = 7 (June to December).
Frequency	Frequency for a recurring product. The term *bi-weekly* means once every two weeks. When you populate this field, you must also populate the # of Periods field.
# of Periods	Number of periods for the recurring product revenue. Recurring revenue can support a maximum of 260 periods. The length of time that is covered by the

Field	Description
	total number of periods varies based on the frequency selected (in the Frequency field). For example, if you have weekly recurring revenue you can track revenue for up to five years. **NOTE:** When you populate this field, you must also populate the Frequency field.
Sales Information	
Sales Stage	Read-only. Sales Stage carried over from the opportunity.
Probability	Probability of a successful outcome for the product sale. The initial value in this field is carried over from the sales stage of the opportunity. You can change the value, if needed, to better reflect your particular product. When the sales stage changes, the value in the Probability field for the opportunity record displays the value related to the new sales stage by default, but the value in the Probability field for the product is not overwritten. **NOTE:** If the Mass Update feature is used to change the sales stage for one or more opportunities, then the value in the Probability percentage field for the opportunities is not updated to the default probability percentage for the new sales stage.
Expected Revenue	A currency value that is calculated based on the Revenue field multiplied by the value in the Probability percentage field.
Account	Account linked to this opportunity. Read-only.
Owner	Person assigned to this opportunity. This value defaults to the opportunity owner. Subsequent changes to the opportunity owner are not reflected in this field. Generally, the owner can update record details, transfer the record to another owner or delete the record. However, access levels can be adjusted to restrict or expand a user's access. This value affects which records are included in forecasts, as well as in the reports that you or your managers run (from Reports and Dashboard pages). Each record has only one owner. However, opportunity records can be shared with other users through Opportunity Team or Account Team pages. For instructions, see Sharing Records (Teams) (on page 134).
Forecast	Indicator to include this product in forecasting totals.

Analysing the Pipeline

In the standard edition of Oracle CRM On Demand, the Pipeline Analysis for Current Quarter section of the Opportunity Homepage shows a quarterly analysis of the pipeline in chart format. You can use this analysis to help you to identify opportunities and challenges. In this section of the Opportunity Homepage, you can place

your pointer on the chart to see specific information, click a segment to review a detailed report, or change the categories in the drop-down lists to view different opportunity and revenue analysis reports. For example, you can generate an analysis that shows the number of opportunities by region.

You can also do any of the following:

■ Use this analysis to see where your deals are in the sales cycle, so you can take action when it is required.

■ Filter by Average (Avg) Number (#) of Days in Stage to see if and where your deals are stalled.

■ Filter by Number (#) of Opportunities to see how many opportunities are in each stage of your sales cycle.

■ Display a list of the deals in each stage to help you focus on the areas that require your attention.

■ Go to the Pipeline Dashboard to see historical and comparative perspectives about your overall performance.

Creating a Special Pricing Request from an Opportunity

You can create a special pricing request from an opportunity.

Note: This feature is available only in Oracle CRM On Demand Partner Relationship Management Edition.

Before you begin. In the standard application, the opportunity special pricing request is not displayed. To add it to the Opportunity Detail page, your company administrator must grant read-only access to the related information for opportunities for your role. Then you must click the Edit Layout link on the Opportunity Detail page and add the special pricing request as a Related Information section (see Changing Your Detail Page Layout (on page 855)).

To create the special pricing request for an opportunity

1 Select the opportunity.

For information on selecting opportunities, see Finding Records (on page 68).

2 On the Opportunity Detail page, scroll down to the Special Pricing Request related information, and click New.

3 In the Special Pricing Product Detail page, enter the required information, and save the record.

For information on the fields, see Special Pricing Product Fields (on page 530).

Specifying Parent and Child Opportunities

You can indicate opportunity hierarchies, such as a sales opportunity that has multiple components, by specifying a parent-child relationship. You can create the parent opportunity from the child opportunity or create the child opportunity from the parent opportunity.

If you delete a parent opportunity that has related subopportunities, the association between the parent and child records is deleted, but the child opportunities remain as active records. The Parent Opportunity External

Unique ID field remains populated for the child opportunity record in case the parent opportunity is later restored from the Deleted Items page.

If you associate a child opportunity with a new parent opportunity record, the Parent Opportunity ID, Parent Opportunity, and Parent Opportunity External Unique ID fields are populated with the values for the new parent. If the original parent record is restored, it is not reassociated with the child record.

If a single child opportunity is deleted, the parent opportunity and any additional child opportunities remain as active records, and the deleted child opportunity moves to the Deleted Items page. The deleted child opportunity is no longer displayed in the Sub-Opportunities related information list for the parent opportunity, but the Parent Opportunity Id, Parent Opportunity, and Parent Opportunity External Unique ID field values remain populated on the deleted child opportunity record.

The following procedures describe how to specify parent and child opportunities:

To specify a parent opportunity

1 Select an opportunity to be the child opportunity.

For instructions on selecting opportunities, see Finding Records (on page 68).

2 On the Opportunity Detail page, click Edit.

3 On the Opportunity Edit page, click the Lookup icon next to the Parent Opportunity field.

4 In the Lookup window, select or create the parent opportunity.

5 Save the record.

To specify a child opportunity

1 Select an opportunity to be the parent opportunity.

For instructions on selecting opportunities, see Finding Records (on page 68).

2 On the Opportunity Detail page, scroll to the Sub-Opportunities section and click New.

3 In the Opportunity Edit page, create the child opportunity.

4 Save the record.

To remove or delete an opportunity hierarchy

1 Select the child opportunity.

For instructions on selecting opportunities, see Finding Records (on page 68).

2 On the Opportunity Detail page, click Edit.

3 In the Parent Opportunity field, delete the current value, type a new value, or use the Lookup icon to choose a new value.

4 Save the record.

Related Topics

See the following topics for related information:

■ Finding Records (on page 68)

■ Opportunity Fields (on page 335)

Creating a Deal Registration from an Opportunity

You can create a deal registration from an opportunity.

Note: This feature is available only in Oracle CRM On Demand Partner Relationship Management Edition.

Before you begin. In the standard edition of Oracle CRM On Demand, the Deal Registrations section is not displayed on the Opportunity Detail page. To add it to the Opportunity Detail page, your company administrator must grant read-only access to the related information for opportunities for your role. Then you must click the Edit Layout link on the Opportunity Detail page, and add the deal registration as a Related Information section (see Changing Your Detail Page Layout (on page 855)).

To create a deal registration from an opportunity

1 Select the opportunity.

For information on selecting opportunities, see Finding Records (on page 68).

2 On the Opportunity Detail page, scroll down to the Deal Registrations related information, and click New.

3 In the Deal Registration Edit page, enter the required information.

For information on the fields, see Deal Registration Fields (on page 505). For information on associating existing deal registrations with existing opportunities and to change existing associations between the two, see Associating Deal Registrations with Opportunities (on page 502).

Splitting Opportunity Revenue Among Team Members

You can split revenue from an opportunity among opportunity team members. The Opportunity Revenue forecast type uses these revenue splits to calculate the revenue noted in the opportunity record. For more information on forecasting, see Forecasts (on page 338) and About Opportunities and Forecasts (on page 315). For more information on opportunity teams, see About Opportunity Teams (on page 334).

To split opportunity revenue among team members

1 Select the opportunity.

For information on selecting opportunities, see Finding Records (on page 68).

2 On the Opportunity Detail page, scroll down to the Opportunity Team section, and do one of the following:

- ■ To add a team member, click Add Users.

- ■ To update team member information, click Edit Users.

3 On the Opportunity Team Edit Users page:

a For each team member, enter information in the required fields, including the Percentage Split field.

b (Optional) Click the Spread Split button to distribute the split percentage evenly among team members.

c (Optional) Click the Refresh Totals button to recalculate the Split Revenue and Totals.

NOTE: The Refresh Totals and Spread Split buttons are not visible unless Enable Opportunity Revenue Split is selected in your   company profile, see Setting Up Your Company Profile and Global Defaults.

4 Save the record.

Opportunity Team Fields

The following table describes some of the fields for opportunity teams.

Field	Comments
Percentage Split	This field shows each team member's percentage of revenue. The default value is 100% for the opportunity owner and 0% for other team members.
Split Revenue	This is a calculated, read-only field. The split revenue is calculated by multiplying the opportunity revenue by the percentage in the Percentage Split field.
User Role	Select an option that defines the relationship between the team member and the opportunity team. This is a required field.
Opportunity Access	Designates a team member's access to the opportunity record. This is a required field.

About Opportunity Teams

For some record types, such as accounts, contacts and opportunities, you can allow a team of users to share a record. To allow a user to share a record, you first add the user to the team for the selected record. Then you specify the access level that the user has to the record and to specified linked records.

Note the following points regarding opportunity teams, account teams and access to opportunity records:

- If team inheritance is enabled for the Opportunity record type (that is, the Enable Parent Team Inheritance for Opportunity check box on the Company Profile page is selected), then when an opportunity is linked to an account, the account team members are added to the opportunity team automatically.

- If you do not want users to be added to an opportunity team automatically when the opportunity record is linked to an account, then make sure that team inheritance is not enabled for the Opportunity record type.

You can add users to opportunity teams in the following ways:

- By clicking the Add Users button on the Record Detail page.

- By using Assignment Manager. For more information, see About Assignment Rules.

- By converting a lead to an opportunity and selecting the option to copy the lead team to the opportunity. Your administrator determines if the lead conversion layout for your role allows you to copy the lead team to the opportunity when the lead is converted.

- By using groups. For more information, see Group Management.

To ensure that a user does not have access to opportunities linked to an account, you must ensure that the user is not given access through one or more of the following methods:

- The user is not on the opportunity team.

- The user does not have a subordinate who is on the opportunity team.

- The user has not been delegated by another user who has access to opportunities.

- The opportunity is not in a book where the user is a member, or in any of its subbooks.

- The user does not have access to the opportunity records from the role settings.

- The access level of the record type for the account related opportunity is set to any option except the following: No Access or Inherit Primary.

About Sales Stages and the Mass Update Feature

When you use the mass update feature to update the Sales Stage field on opportunity records, the values that are available for you to select in the Sales Stage field for a record are determined by the following:

- The value in the Opportunity Type field

- The default sales process assigned to your user role if one is assigned

If the Opportunity Type field on an opportunity record is blank, and if you do not select an opportunity type when you update the record through the mass update, then the following happens:

- If a default sales process is assigned to your user role, then the sales stages for that sales process are available for selection in the Sales Stage field in step 2 of the mass update.

■ If a default sales process is not assigned to your user role, then the sales stages for the default sales process for the company are available for selection in the Sales Stage field in step 2 of the mass update.

If the Opportunity Type field on an opportunity record is already populated, or if you select an opportunity type when you update the record through the mass update feature, then the following happens:

■ If a specific sales process is associated with the opportunity type, then the sales stages for that sales process are available for selection in the Sales Stage field in step 2 of the mass update.

■ If a specific sales process is not associated with the opportunity type, then the following happens:

■ If a default sales process is assigned to your user role, then the sales stages for that sales process are available for selection in the Sales Stage field in step 2 of the mass update.

■ If a default sales process is not assigned to your user role, then the sales stages for the default sales process for the company are available for selection in the Sales Stage field in step 2 of the mass update.

If the Opportunity Type field on an opportunity record is already populated, but you clear the value from the Opportunity Type field when you update the record through the mass update feature, then the following happens:

■ If a default sales process is assigned to your user role, then the sales stages for that sales process are available for selection in the Sales Stage field in step 2 of the mass update.

■ If a default sales process is not assigned to your user role, then the sales stages for the default sales process for the company are available for selection in the Sales Stage field in step 2 of the mass update.

■ If you do not update the Sales Stage field through the mass update, then the Sales Stage field on the opportunity record remains unchanged when you complete the mass update. However, the next time a user attempts to update the value in the Sales Stage field on the opportunity by editing it inline or on the Opportunity Edit page, the values that are available for selection in the Sales Stage field are determined as follows:

■ If a default sales process is assigned to the user's user role, then the sales stages for that sales process are available for selection in the Sales Stage field.

■ If a default sales process is not assigned to the user's role, then the sales stages for the default sales process for the company are available for selection in the Sales Stage field.

For more information about using the mass update feature, see Updating Groups of Records (on page 137).

Opportunity Fields

Use the Opportunity Edit page to add an opportunity or update details for an existing opportunity. The Opportunity Edit page shows the complete set of fields for an opportunity.

TIP: You can also edit opportunity information on the Opportunity List page and the Opportunity Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information that you see on-screen might differ from the standard information described in this table.

CAUTION: Information you enter for opportunities can affect the revenue forecasts for your company.

The following table provides additional information regarding some fields.

Field	Description
Key Opportunity Information	
Opportunity Name	Name for this opportunity.
Account	Account linked to this opportunity.
Parent Opportunity	The parent opportunity that is linked to this opportunity.
Sales Stage	Stages in the sales process, such as Qualified Lead, Building Vision, Short List, Selected, Negotiation, Closed/Won or Closed/Lost. **NOTE:** When the sales stage changes, the value in the Probability percentage field is automatically updated to the default probability value for the new sales stage unless you use the Mass Update feature to change the sales stage. If you use the Mass Update feature to change the value in the Sales Stage field on one or more records, then the value in the Probability percentage field on the records is not updated to the default probability percentage for the new sales stage.
Next Step	Next action that needs to be accomplished for this opportunity.
Revenue	The amount of revenue for the opportunity. The default value is zero. This value affects the forecasts for opportunity revenue. **NOTE**: Any default or post default values that are specified for this field are ignored.
Close Date	The expected date for the opportunity to close. This is a required field. In the standard application, when you create an opportunity, the default value in the Close Date field is today's date. Your administrator can specify a different default value for the field or can configure the field so that it is blank when you create a new opportunity. If the field is blank, then you must update it. The close date is used in generating forecasts.
Forecast	If this check box is selected, it indicates that the opportunity is to be included in the forecast revenue calculation.
Sales Detail Information	
Status	Status of this opportunity, such as Pending, Lost, or Won.
Priority	Priority level for this opportunity, such as High, Medium or Low.
Lead Source	Category of the primary source, such as Advertisement, Direct Mail, Email, Event - Seminar, Event - Trade Show, Event - Other, List - Purchased, List - Rented, Partner, Referral - Employee, Referral - External, Website or Other.

Field	Description
Source Campaign	The campaign that generated the opportunity. If the opportunity is created through the lead conversion process, this field is automatically populated from the Campaign field on the lead record. If the opportunity is created by a user, the user can enter the information in this field.
Probability %	A percentage that reflects the confidence you have that the deal will close with the specified revenue on the specified close date. The Probability percentage field is based on the default probability value for the selected sales stage.
	You can change the value in the Probability percentage field, if needed, to better reflect your particular opportunity while it is in that sales stage. However, when you select a new sales stage for the opportunity, the value in the Probability percentage field is automatically updated to the default probability value for the new sales stage.
	NOTE: If you use the Mass Update feature to change the value in the Sales Stage field on one or more opportunity records, then the value in the Probability percentage field on the records is not updated to the default probability percentage for the new sales stage. If you want the probability percentage on the opportunities to change when the sales stage is updated, then you must update the sales stage on each record individually or through Web services.
Expected Revenue	A currency value that is calculated based on the Revenue field multiplied by the value in the Probability percentage field. A lower percentage in the Probability field reduces the expected value that is included in your revenue forecast.
Reason Won/Lost	Reason for opportunity being won or lost, such as Installed Base, Price, Relationship, Track Record, No Current Project, No Budget, Not Qualified, Lost to Competition, Lost to No Decision or Other.
Additional Information	
Owner	The owner of the opportunity record.
	Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access.
	The value in the Owner field affects which records are included in the reports that you or your managers run from the Reports and Dashboard pages.
	You can share opportunity records with other users through the Opportunity Team or Account Team pages. For information about sharing records with other users, see Sharing Records (Teams) (on page 134).
	Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes,

Field	Description
	see About Data Access, Record Sharing, and Record Ownership (on page 47).
Reassign Opportunity	Indicates that the opportunity should be reassigned. If your company administrator has set up opportunity assignment rules, then selecting this field triggers the assignment manager in Oracle CRM On Demand to process the opportunity again and assign it according to the rules. The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. The assignment manager cannot reassign records if the record type is configured in book mode. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47). **NOTE:** The processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned and the current system load. In the case of opportunities, the processing time is also affected by the number of opportunity team members and the number of accounts and contacts associated with the record. The owner name changes when the record is reassigned.
Description	Additional information about the opportunity. For example, include the product interest (500 parts) and the account (Acme Ltd.) in the opportunity description. This field has a limit of 16,350 characters.

Forecasts

Use the Forecast pages to review, adjust, and submit forecasts. A *forecast* is a saved snapshot of expected revenues over time. Oracle CRM On Demand calculates forecasts for each quarter and breaks down that information by fiscal month.

Forecasts in Oracle CRM On Demand automate a process that is often manual and sometimes inaccurate. Forecasts help companies to develop sales strategies. They also help companies to identify future business needs by giving managers accurate and up-to-date information about expected sales and quarterly progress toward sales targets. Individual sales representatives do not have to compile statistics. Instead, they decide when to include a record in their forecasts. The remainder of the process is automatic.

Your company can base its forecasts on any of the following:

■ Opportunity revenue

■ Opportunity product revenue and quantities linked to opportunities

■ Account revenue

■ Contact revenue

The forecast snapshots save the forecasted opportunity, product, or revenue information and the adjusted forecast totals, so that you and your managers can review and evaluate forecast trends. In addition, you can view saved forecasts to examine the history of opportunities on which the team is currently working.

Your company can set up forecasts to run on a weekly or monthly basis. At the start of the specified day (that is, at 1 minute past midnight in the time zone of the hosting facility), Oracle CRM On Demand automatically generates the forecast and displays an alert on My Homepage. After receiving this alert, you can review the forecast to analyse the newly calculated pipeline, forecast, and closed revenue against quota information.

An hour before the next scheduled forecast generation, the current forecast is automatically archived, preventing anyone from editing it.

Working with the Forecast Homepage

The Forecast Homepage is the starting point for managing forecasts. This page lists forecast summary information relevant to you.

You can limit the records listed on the Forecast Homepage using two different methods:

■ If the Alpha Search controls are available, then you can find specific forecasts by clicking a column heading to sort the records based on the values in that column, and then clicking a letter in the Alpha bar to show only the records that begin with that letter. You can also type characters in the text field, and click Go to find the records beginning with those characters. Click the All link to show the entire list of forecasts.

   NOTE: If your user language is Korean, Japanese, Simplified Chinese, or Traditional Chinese, then the Alpha Search controls are not available.

■ Number of records displayed. Adjust the value in this field to show a greater or lesser number of records in the summary list.

The Forecast Homepage lists your forecasts according to the date on which they were created, with the most recent forecasts listed first. It also gives a summary of important information:

■ Status is the current state of the forecast. Successfully completed forecasts will have a status of Active. A forecast with a status of Submitted indicates the forecast is ready for management review.

■ Pipeline revenue is the combined revenue from all your records, regardless of the setting of the Forecast check box or sales stage on the individual records. Pipeline revenue is not applicable to account or contact revenue forecasts.

■ Forecast revenue equals the total revenue for all records that have the Forecast checkbox selected.

■ Closed revenue equals the total revenue for all opportunities or product revenue with a sales stage value of Closed-Won. For account and contact revenues, the status field value of Closed includes the record in

the calculation of the closed revenue. Closed revenue is recognised for the revenue amount that pertains to the forecast period, which is based on the starting closing dates for the record.

Managing Forecasts

To manage forecasts, do the following tasks:

- Reviewing Forecasts (on page 341)

- Refreshing Forecasts (on page 342)

- Viewing and Editing a Forecast Using a Different Currency (on page 344)

- Viewing Forecast History (on page 344)

- Submitting Forecasts (on page 345)

- Unsubmitting Forecasts (on page 345)

- Managing Quotas (on page 346)

- Managing Your Team's Forecasts (see "Managing Your Team's Forecasts" on page 347)

NOTE: Forecasting relies on user roles and reporting hierarchies. To create forecasts successfully, all users who have a user role that is designated as a forecast role must have a status of Active on their user record, and they must have a manager specified in their user record. The manager is specified in either the Reports To field or the Reports To (Alias) field, whichever is present on the user page layout.

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)

- Updating Record Details (on page 103)

- Linking Records to Your Selected Record (on page 104)

- Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

- Forecast Fields (on page 350)

- Working with the Forecast Homepage (on page 339)

- Setting Up Users

- Setting Up Users' Sales Quotas

■ Reports (on page 907)

Reviewing Forecasts

Forecasts are generated automatically either weekly or monthly, according to your company's business process. Each time a new forecast is generated you receive an alert on My Homepage. After you receive the notification, review your forecast.   When reviewing your forecast, the forecast summary months align with your company's fiscal calendar definition. If you are using a fiscal calendar such as 4-4-5, 5-4-4, or custom fiscal calendars, your company's forecast periods may not necessarily correspond to a Gregorian calendar. Therefore, if an Opportunity falls in the calendar month of June, it does not mean that it will be forecasted as part of the fiscal month of June.   For more information about custom fiscal calendars, see About Fiscal Calendars.

NOTE: When using custom fiscal calendars, the forecast periods are based on the fiscal years and months defined by your company administrator.

To review forecasts

1 Click the Forecasts tab.

The Forecast Homepage shows forecast summary information that includes Status, Pipeline, and Closed Revenue. You can sort the forecast summary by status, forecast date, or owner (managers only). Pipeline is not applicable to account or contact revenue forecasts.

2 In the Forecast Homepage section, click the Forecast Date link for the forecast you want to review.

3 On the Forecast Detail page, review the information in the following sections:

■ **Forecast Summary**. This section summarises forecasts by fiscal quarter and month. The Forecast Summary list provides information on Quota, Closed Revenue, Quota %, Forecast amount, Best Case, Pipeline, and Expected Revenue. You can sort the summary list by month.

Team's Summary by Month. This section shows a list of forecasts for each team member. If you are a manager, you will see the forecast Month, Quota %, Forecast amount, Closed Revenue, Best Case, Pipeline and Last Updated date by Owner Alias (team member). If you drill down on a specific team member's row within the Team's Summary, the corresponding forecast detail page for the selected user appears. On this page you see the team member's individual forecast summary and forecasted revenue in the My Opportunities, My Revenues, or My Products section.

NOTE: For Account and Contact Revenue forecast types the summary sections do not include Pipeline, Best Case, or Expected Revenue.

■ **Team's Product Summary.** (Opportunity Product forecast type only)   This section shows a list of forecasted products for each team member.   If you are a manager, you will see the Closed Quantity, Forecasted Quantity, Pipeline Quantity, Closed Revenue and Expected Revenue by Owner Alias (team member) and product. If you drill into a specific team member's row within the Team's Product Summary, the corresponding forecast detail page for the selected user appears. Here you will see their individual Forecast Summary and forecasted quantities by Product in the My Products section.

NOTE: The Forecast Detail page shows only five of your team's records. To view the entire list of records, click Show Full List under the Team's Summary by Month section.

- **My Opportunities.** If you are using the Opportunity Revenue forecast type, this section appears as part of your forecast detail.   This section lists current opportunities, and indicates whether the opportunity is forecasted. It also shows the Close Date, Account Name, Revenue amount, current Sales Stage, and Next Step, if specified, for each opportunity.

- **My Revenues.** If you are using the Opportunity Product, Account or Contact Revenue forecast type, this section appears as part of your forecast detail. This section lists current revenues, and indicates whether the revenue record has been forecasted by the owner (forecast flag selected). It also shows the Start and Close date, Product name, Revenue amount, and Account Name for each revenue record that you enter.

  Additional columns might be displayed in the My Revenues section, depending on the revenue type being forecasted.

  For opportunity product revenue forecasts, the following columns are displayed:

  - Opportunity Name

  - Sales Stage

  For account and contact revenue forecasts, the following columns are displayed:

  - Product Category

  - Status

  - Contact Name

- **My Products.** If you are using the Opportunity Product forecast type, this section appears as part of your forecast detail. A row for each product forecasted is listed along with the corresponding product category, closed quantity, forecasted quantity, pipeline quantity, closed revenue, and expected revenue. These values are the sum of all forecasted opportunities for the selected user forecast. To see the forecasted opportunities associated with a specific product, click the product name.

  NOTE: If you are using the Opportunity Product forecast type, you can also view all forecasted opportunities within a specific product category by clicking the Product Category field.

  You can verify the forecast type that was used in a forecast and that was based on the Type field in the Forecast information section.

Viewing and Editing Forecasts Using a Different Currency

The View In currency conversion feature allows you to specify in which currency you want to display your forecast. For more information on viewing and editing forecasts in different currencies, see Viewing and Editing a Forecast Using a Different Currency .

Refreshing Forecasts

Forecasts are snapshots of revenue data for specific periods. If an opportunity or revenue record is updated, you can refresh some values for your current, unsubmitted forecast to ensure that the forecast reflects the most up-to-date information. You can then adjust those records in the Forecast Summary section to more accurately reflect the revenue that will be generated.

Updating the record values that contribute to the forecast amounts, and then recalculating the forecast totals, allows for more consistent forecasting. Updates to the Revenue, Close Date, Sales Stage, Probability, Forecast, Quantity, or Status fields can affect your forecast.

To update record values and refresh forecast amounts

1 Click the Forecasts tab.

The Forecast Homepage lists your forecasts according to the date on which they were created, with the most-recent forecasts listed first.

2 In the Forecast Homepage Section, click the Forecast Date link for the forecast that you want to update.

3 In the My Opportunities, My Revenues, or My Products section on the Forecast Detail page, click the Opportunity Name, Start/Close Date, or Product link for the record that you want to modify.

4 On the Detail page, click Edit.

5 On the Edit page, update the appropriate values for the opportunity or revenue record, and click Save.

6 Navigate back to the Forecast Detail page, and then click the Refresh link in the record row.

7 On the Forecast Detail page, click Rollup.

The forecast summary totals are updated based on the opportunity or revenue records that you modified.

NOTE: To capture any updates made to the opportunity or revenue records in the forecast summary, click Rollup.

When you click Rollup, any prior adjustments to the forecast summary totals are overwritten with the new values brought in from the opportunity or revenue records; therefore after updating your records, you might still want to adjust your forecast summary to reflect your sales expectations more accurately.

Adjusting Forecast Totals

Sales representatives and managers can make high-level adjustments by month to their current, forecasted revenue to make sure that the automatically generated forecast reflects values based on professional judgement. You can adjust the following forecast summary fields:

■ Forecast

■ Best Case

NOTE: Only the forecast owner can adjust forecast totals.

To adjust forecast totals

1 Click the Forecasts tab.

2 In the Forecast Homepage section, click the Forecast Date link for the forecast record you want to adjust.

3   In the Forecast Summary section, click Edit.

4   On the Forecast Edit page, type your adjusted revenue values in the Forecast or Best Case fields.

5   Click Refresh Totals to verify your adjusted values, and then click Save.

NOTE: Best case revenue is not applicable to account or contact revenue forecasts.

Viewing and Editing a Forecast Using a Different Currency

The view-in currency conversion feature allows you to specify in which currency your forecast should be displayed. By default, the forecast will be displayed in your native currency (the default currency selected on your user profile or your company's default currency). You can also edit forecasts in the selected currency if you are managing opportunities in multiple economic zones.

If the forecast is edited while being viewed in euro (EUR), then the user can enter forecast values in euro. When the edited forecast is saved, it is converted to and saved in your company's default currency.

To view a forecast using a different currency

1   Click the Forecasts tab.

2   From the Forecast Homepage, click the Forecast Date link for the forecast that you want to review.

3   On the Forecast Detail page, select the currency from the View In list in the Forecast Summary title bar.

The view-in currency value displays your user profile currency by default. If your user profile currency is not defined, the View In selector displays your company's currency by default. All of your company's active currencies are available for selection.

When you select a view-in currency, the forecast values are converted from the stored forecast currency (company currency) to the selected view-in currency, using the valid exchange rates for the forecast date.

If you drill down on a forecast record, or select a view-in currency that does not have a valid exchange rate defined for the forecast date, the forecast is displayed in your company's default currency instead, and an advisory message is displayed.

Viewing Forecast History

You can view a history of forecasts to determine trends over time.

To view your forecast history

1   Click the Forecast tab.

2   In the Forecast Homepage section, click the column heading in which you want to sort the records.

3   Review the trends over time for forecast, pipeline, and closed revenue.

Submitting Forecasts

The last step in creating a forecast is to submit it to your manager for review. When the forecast reflects the amounts that you want to include in your company's forecasts, submit the forecast.

NOTE: Managers can submit forecasts for their direct reports. This option must be selected when you set up your forecast definition. If this option is not selected, managers cannot submit their forecasts until all of the managers' direct reports submit their forecasts.

Submitted forecasts cannot be edited. If you need to adjust a submitted forecast, your manager or administrator must first unlock (unsubmit) the record. For more information, see Unsubmitting Forecasts (on page 345).

To submit your forecast

1   Click the Forecasts tab.

2   In the Forecast Homepage section, click the Forecast Date link for the forecast record you want to submit.

3   On the Forecast Detail page, click Submit Forecast in the Forecast Summary title bar.

Related Topics

See the following topic for related information:

■   Unsubmitting Forecasts (on page 345)

■   Setting Up the Forecast Definition

Unsubmitting Forecasts

For a forecast owner to update a submitted forecast, a manager or administrator must first unlock (unsubmit) the record.

To unsubmit a forecast

1   Click the Forecasts tab.

2   In the Forecast Homepage section, click the Forecast Date link for the forecast record you want to unlock.

3   On the Forecast Detail page, click Unsubmit Forecast.

This action unlocks the forecast, allowing direct reports to update and adjust their forecasts, and then resubmit the forecasts.

NOTE: Clicking Unsubmit Forecast sets the forecast status to Active.

Related Topics

See the following topics for related information:

- Submitting Forecasts (on page 345)
- Setting Up the Forecast Definition

Managing Quotas

If your company administrator is not responsible for setting your quotas, you can create and update quotas for periods throughout the year using the Edit Quota page. This allows you to compare and adjust your quotas against forecasts. You also can review your quota target history for every period, in each year.

After a quota is created, the monthly quota values are automatically reflected in the forecast after the forecast is generated. All active quotas are added together for the month and the totals are displayed in the forecast. If you do not want a quota to be included in your forecast, set the Status field to Inactive until you are ready to track the quota.

To manage your quota

1. From any page, click the My Setup link in the top right corner.

2. From the Personal Homepage page, click the Personal Profile link in the Personal Profile section.

3. From the Personal Profile page, click the My Profile link in the Personal Information section.

   My Profile allows you to define quotas and sharing groups, as well as change your currency, language and time zone.

4. On the Personal Detail page, scroll down to the Quotas section and then click New Quota.

   Existing quotas appear in the Quotas list and can be sorted by year, name and status. If you want to modify a listed quota, select Edit in the record-level menu for the quota record you want to edit. To remove a quota from the list, select Delete in the record-level menu for the quota record you want to delete.

5. On the Edit Quota page, complete the required fields for the new quota:

   a. Select the calendar year in which the quota will begin.

      NOTE: The year that you select on this page is the calendar year, not the fiscal year. The fiscal year can be different from the calendar year. For example, your company's fiscal year might begin on 01 April and end on 31 March (in the following calendar year).

   b. Make sure that the Status is Active.

   c. Enter a name for the quota.

6. Enter quota information for each month. (The monthly quota fields start with the first month of your company's fiscal year.)

7 Save the quota.

To spread a total quota amount evenly across months of the year

1 On the Personal Detail page, scroll down to the Quotas section and then click New Quota.

2 On the Edit Quota page, enter the required information, ensuring that the quota Status is Active.

3 In one of the month fields, enter the total quota amount for the year and then click Sum.

The amount appears in the Total Quota field.

4 Click Spread.

The total amount is spread equally across the 12 months of the year and the apportioned amount appears in the fields associated with each month.

5 Save the quota.

The quota appears in the Quotas list.

Managing Your Team's Forecasts

If you are a manager, you can:

◼ Review and adjust forecasts for your team

◼ View all opportunities owned by your team

◼ Unsubmit a forecast so that a team member can adjust it

Your team consists of all employees associated to roles that report to you. This role hierarchy is set up in User Administration. For more information, see Setting Up Users.

To review forecasts and opportunities for your team

1 Click the Forecasts tab.

2 In the Forecast Homepage section, click the Forecast Date link in the forecast record.

The Forecast Detail page shows a summary of your team's totals, the totals for each team member by month, and the date the forecast was last updated.

3 On the Forecast Detail page, click the Owner Alias link of the team member whose forecast you want to view.

TIP: If you want to display the forecast summaries of all your team members, click the Show Full List link.

The team member's Forecast Detail page appears. From this page, you can review the team member's forecast totals and all of the individual's forecasted opportunities, but since the details are read-only, you cannot edit them.

Forecast Detail Page

The Forecast Detail page displays forecast information for the selected forecast participant. This page shows the forecast summary, which lists projected revenue amounts by fiscal month, the corresponding user quota and percent attainment, as well as a list of the individual's forecasted opportunities, revenues or products.

Managers can also see their team's summary by month. As a result, managers can see their own detailed forecasted records and the summary records of their direct subordinates for the forecasted period.

Fiscal months are indicated by their standard names in the Forecast Summary and Team's Summary sections. However, the duration of the month is based on your company's definition of the fiscal calendar . For example, the month of October might start on 15 October and end on 14 November.

The following table describes the tasks that you can do from the Forecast Details page.

To do this	Follow these steps
Change the currency for a displayed forecast	In the Forecast Summary title bar, click View In and select the currency.
Show all of your team's forecast summaries	Click Show Full List under the Team's Summary by Month section. This section is available only if you are a manager-level user. In this section, a line item is listed for each team member by fiscal month.
Show all of your team's product summaries	Click the Show Full List link under the Team's Product Summary section. This section is only available if you are a Manager level user and you are using the Product Quantity Forecast type. In this section, a line item is listed for each team member by product.
Show the forecast detail for a specific user	In the Owner Alias column of a team's summary section, click the name of the user for whom you want to see forecast details.
Show all forecasted opportunity records for a specific user	Click Show Full List under the My Opportunities section. This section is available only if you are using the Opportunity Forecast type. This page lists a row for each revenue record forecasted along with the corresponding close date, forecast flag, opportunity name, account name, revenue, sales stage, and next step.
Show all forecasted revenue records for a specific user	Click the Show Full List link under the My Revenues section. This section is available only if you are using the Product Revenue, Account Revenue or Contact Revenue Forecast type. This page lists a row for each revenue record forecasted along with the corresponding start and close date, forecast flag, product name, opportunity name, account name, revenue, and sales stage.
Show all forecasted product records for a specific user	Click Show Full List under the My Products section. This section is available only if you are using the Product Quantity Forecast type. This page lists a row for each product forecasted along with the corresponding closed quantity, forecasted quantity, pipeline quantity, closed revenue and expected revenue. These values are the sum of all forecasted opportunities for the user.

To do this	Follow these steps
Show all forecasted opportunities within a product category for a specific user	In the Product Category column, click the category for which you want to see the forecasted products. This page shows the specific values for each of the related opportunities for the selected product category, including the close date, opportunity name, individual quantities, and revenue amounts.
Show all forecasted opportunities for an individual product for a specific user	In the Product Name column, click the product for which you want to see forecasted opportunities. This page shows the specific values for each of the related opportunities for the selected product, including the close date, opportunity name, individual quantities, and revenue amounts.
Update a forecasted opportunity	In the My Opportunities, My Revenues or My Product Revenues section within the Forecast Detail, click Opportunity Name to navigate to the opportunity details. When you save your changes, return to the forecast by clicking Back to Forecast Detail, and then click Refresh. Any adjustments made to the opportunity detail records are not captured in the forecast summary section until you click Rollup.
Rollup forecasted revenue	In the Forecast Summary section, click Rollup. Clicking Rollup updates (recalculates) the total fields based on your opportunity updates. Any adjustments made to the forecast revenue amounts will be overwritten after clicking Rollup.
Update the forecast or best case revenue amounts	In the Forecast Summary title bar, click Edit. Clicking Edit opens the Forecast Edit page. Enter revenue adjustments, and click Save.
Submit a forecast	In the Forecast Summary section, click Submit Forecast. The Status to Submitted field is updated, indicating to a manager that the forecast is ready for review.
Unsubmit a forecast	In the Forecast Summary section, click Unsubmit Forecast. The forecast is unlocked. The status is set to Active, allowing a user to update and adjust his or her forecast, and then resubmit it. Only the reporting manager or company administrator can perform this action.

Forecast Fields

The forecast revenue related fields (quota, closed revenue, quota %, forecast, pipeline, and expected revenue) are calculated. See the following table for more information about the fields.

Field	Description
Best Case	(Optional) This field represents a best-case estimate of the revenue that will be produced by all opportunity or product revenue.
	This field is not applicable to account or contact revenue forecasts.
Closed Revenue	Read-only. This field is calculated. If your company bases its forecasts on opportunities, then the closed revenue is the total of all eligible opportunities with a sales stage of Closed-Won.
	If your company bases its forecasts on products, then the closed revenue is the total of all eligible product revenue records during that period, with the sales stage of Closed-Won.
	If your company bases its forecasts on account or contact revenues, then the closed revenue is the total of all eligible revenue records with a status of Closed.
Expected Revenue	Read-only. This field is a weighted average. The value is calculated based on the Potential Revenue field multiplied by the value in the Opportunity Probability field.
	This field is not applicable to account or contact revenue forecasts.
Forecast	The value in this field is calculated when the forecast is generated. However, you can adjust the value in this field manually to make sure that the forecast reflects values based on your professional judgment.
	If the Forecast check box is selected in the Opportunity record, the forecast is the total of all opportunities during the forecast period. If the Forecast check box is selected in the Revenue record, the forecast is the total of all revenue records during the forecast period.
Owner	Indicates the person who owns or is responsible for this forecast. Oracle CRM On Demand generates this information.
Last Updated	The date when the team member's forecast record was last updated. The forecast date is displayed by default. If a user performs an edit, rollup, submit, or unsubmit for a forecast, this field shows the date the record was changed. Oracle CRM On Demand generates this information.
Pipeline	Read-only. This field is calculated. The pipeline is the total of all opportunity or product revenue records for the forecast period, regardless of the setting of the Forecast check box or sales stage on the individual records.
	This field is not applicable to account or contact revenue forecasts.
Quota	Read-only. The sales revenue target for the forecast period. The quota can be set up by the individual user or the administrator. Only active quotas are used when creating forecasts.

Field	Description
Quota %	This field is calculated. The quota percent is the closed revenue value divided by the quota value.
Status	Oracle CRM On Demand generates the forecast status. The forecast status can be one of the following:
	■ **Active.** Oracle CRM On Demand sets this status when forecast generation is complete.
	■ **Submitted.** Oracle CRM On Demand sets this status when you click Submit Forecast. The record is locked unless your manager or a company administrator unlocks (unsubmits) it.
	■ **In Progress.** Oracle CRM On Demand sets this status while the forecast is being generated.
	■ **Incomplete.** Oracle CRM On Demand sets this status if there is an error while reading, associating, or rolling up revenue. An incomplete forecast can sometimes occur due to a user error, such as a hierarchy issue, or other data-related problems.
	■ **Pending.** Oracle CRM On Demand sets this status if an issue occurs while processing your company's forecast. If your company administrator did not receive an email notification describing the forecast issue, contact Customer Care.
	■ **Archived.** Oracle CRM On Demand sets this status 1 hour before it runs a new forecast. After this status has been set, the forecast becomes read-only, and you cannot unlock it.

Addresses

Use the Address pages to create, update, and track addresses that are shared between account, contact, dealer, and partner records.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include working with addresses, then the Address tab might be excluded from your set-up.

If your company administrator enables the address record functionality by selecting the Enable Shared Addresses check box on the company profile, then the addresses that you create in the Address pages can be associated with multiple account, contact, dealer, or partner records (shared address functionality). Companies that do not have Enable Shared Addresses configured do not share address information between any records, and the address information in each record is specific to each record (unshared address functionality).

NOTE: Oracle CRM On Demand supports shared address functionality only for account, contact, dealer and partner record types. For other record types containing address fields, such as leads, households, orders, and so on, Oracle CRM On Demand only supports unshared address functionality.

NOTE: Shared addressing is not compatible with Oracle Offline On Demand. If shared addresses are enabled for the company, and if you are creating new account or contact records with addresses in Oracle Offline On Demand, then data uploads from Oracle Offline On Demand to Oracle CRM On Demand fail. However, if you create new account or contact records without addresses, then the data uploads correctly from Oracle Offline On Demand to Oracle CRM On Demand. For more information on Oracle Offline On Demand, see Using the Offline Client (on page 878).

Characteristics of the Shared Address Functionality

Some characteristics of the shared address functionality when configured for a company are as follows:

- Account, contact, dealer, and partner records can share and reuse a common, top-level address record.

- Addresses have many-to-many relationships. That is, accounts can have multiple addresses (for example, hospitals might have multiple buildings with unique addresses), and contacts can have multiple addresses (for example, a doctor can have a hospital address, a clinic address, and a private office address). Multiple contacts can use each address (for example, more than one doctor can work at each address) and multiple accounts can use each address (for example, multiple clinics might share the same building at a particular address).

- Using a simple search, you can search for all address records that share a ZIP or postal code, a city, a province, a state, or an address (Address line 1 field). With advanced search, you can find all record types (accounts, contacts, dealers, and partners) that match user keywords, such as the city, state, ZIP, or postal code. You can search for addresses that are shared, and you can confirm which contacts, accounts, dealers, or partners are using a particular address. However, you cannot search record types to find all the accounts, contacts, dealers, or partners that use a particular shared address.

- Addresses are treated as independent entities that can be imported into Oracle CRM On Demand from an external set of addresses. This is useful when using a third-party system for data quality and address validation (to ensure that correct address conventions are used and that there are no typographic errors or duplications).

- Addresses have no territory affiliations. Territory affiliations are defined only in relationship to account, contact, dealer, or partner records.

- Addresses are not book-enabled. Book segmentation is defined only in relationship to account, contact, dealer, or partner records.

- A top-level shared Address record supports the addition of Web applets. However, for Release 26 and later, Account Address, Contact Address, Dealer Address, or Partner Address records also support the addition of embedded Web applets as a Related Information section. For more information on how your administrator sets up Web applets for your company, see Creating Web Applets for Record Types.

What Tasks Can You Perform with Address Records?

You can create, edit, or delete address records from the top-level tab. You can also create or remove address records directly from account, contact, dealer or partner records, or add existing address records to account, contact, dealer or partner records. In addition, you can edit certain fields on the shared address record (such as the Address Type picklist, or the Primary, Billing, and Shipping settings) within account, contact, dealer or partner records. The remove functionality removes the association between the address and the account, contact, dealer or partner record, while retaining the shared address as a global resource. Standard lists are available on the Address homepage, which users can access by default. Because a shared address cannot be owned by users, these lists are prefaced by the word *ALL*, and not *MY*.

About Denormalised Fields

When shipping and billing addresses are set for accounts, dealers, and partners, and primary addresses are set for contacts, Oracle CRM On Demand stores the address fields directly on the parent object. This process is called *denormalisation*. If the shared address fields are deleted or updated, Oracle CRM On Demand propagates the changes to the account, contact, detail, or partner records that are using the shared address so that all address data is consistent and data integrity is preserved. The denormalisation also improves the search capability.

What Is the Effect of the Propagation of Denormalised Fields?

Because of the propagation of changes to fields on the account, contact, dealer, and partner records, updates to addresses might take several minutes to process by the Oracle CRM On Demand propagation business service. In addition, if a top-level shared address is deleted, then a similar delay might occur when the Oracle CRM On Demand propagation business service is removing address values in the denormalised fields. If a timeout or error occurs, the Oracle CRM On Demand propagation business service attempts to repropagate the changes at midnight, every night. If propagation does not take place, your company administrator might have to manually apply the changes, or contact Oracle CRM On Demand Customer Care for assistance, if necessary.

Working with the Address Homepage

The Address Homepage is the starting point for managing addresses.

NOTE: Your company administrator can customise the layout of your Address Homepage. In addition, if your user role includes the Personalise Homepages privilege, then you can add sections to the page and remove sections from the page.

Creating an Address

You can create an address by clicking the New button in the Recently Modified Addresses section. For more information, see Creating Records (on page 51) and Address Fields *(on page 367).*

Working with Address Lists

The Address Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for shared addresses.

Address List	Filters
All Addresses	All addresses, sorted alphabetically using the address name.
Recently Modified Addresses	All addresses, sorted by the modified date.
Recently Created Addresses	All addresses, sorted by the created date.

Address List	Filters
All Validated Shared Addresses	All addresses that have been marked as validated by the customer, sorted alphabetically using the address name. Validation processing occurs outside of Oracle CRM On Demand and is used by many companies to standardise address data, confirm that the addresses exist, and that they are usable by official agencies such as the United States Postal Service. For information on marking addresses as validated, see Marking Shared Addresses as Validated (on page 359).
All Non-Validated Shared Addresses	All addresses that are not marked as validated by the customer, sorted alphabetically using the address name.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Addresses

The Recently Modified Addresses section shows the shared addresses that you modified most recently.

Adding Sections to Your Address Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Address Homepage:

- All Addresses

- Recently Modified Addresses

- Recently Created Addresses

- All Validated Shared Addresses

- All Non-Validated Shared Addresses

To add sections to your Address Homepage

1 On the Address Homepage, click Edit Layout.

2 On the Address Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Related Topics

See the following topics for related information about shared addresses:

■ Addresses

■ Managing Addresses (on page 355)

■ Address Fields (on page 367)

Managing Addresses

For information about managing addresses, see the following topics (which include procedures for both shared and unshared addresses):

■ Creating New Shared Addresses in Account, Contact, Dealer or Partner Records   (on page 356)

■ Sharing Addresses Between Account, Contact, Dealer, and Partner Records (on page 358)

■ Marking Shared Addresses as Validated (on page 359)

■ Adding DEA Information to Contact Addresses (on page 360)

■ Creating New Unshared Addresses in Account, Contact, Dealer, or Partner Records (on page 362)

■ Removing Addresses from Accounts, Contacts, Dealers, or Partners (on page 363)

■ Deleting Shared Addresses (on page 363)

■ About Linking Records to Addresses (on page 365)

■ Viewing Address Records from Accounts, Contacts, Dealers, or Partners (on page 365)

■ Accessing a Map for an Address (on page 365)

■ About Geocode Fields in the Address Record Type (on page 369)

NOTE: The Addresses feature is not part of the standard edition of Oracle CRM On Demand, so shared addresses might not be available to your company.

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

■ Working with Records (on page 46)

Creating New Shared Addresses in Account, Contact, Dealer or Partner Records

When shared address functionality is configured, you can create a new address record directly in an account, contact, dealer, or partner record, without having to go to the Address tab by completing the Addresses section on the Detail page for the record if the Addresses section is configured. After you create an address record, it is listed in the Address homepage.

Before you begin. The Addresses related information is not shown on the Account, Contact, Dealer, or Partner Detail pages by default. To allow you to see this information, your company administrator must grant access to the Addresses related information for your role. You or your company administrator must then add the Addresses related information to your Details page layout for the record type. For more information on customising your Detail page layouts, see Changing Your Detail Page Layout (on page 855).

To create a new shared address record from an account, contact, dealer, or partner record, the Enable Shared Addresses check box must be selected, while the Validate Shared Addresses check box must be deselected in your Company Profile.

NOTE: When shared addressing is not configured; that is, the unshared address functionality is being used, you cannot create new shared addresses from the Addresses section on the Detail pages.

To create new shared addresses in account, contact, dealer, or partner records

1 On the Detail page for the account, contact, dealer, or partner record, navigate to the Addresses section if it is configured.

2 To create a new shared address, click New.

   NOTE: The New button is displayed only if address validation is turned off for the company. If address validation is turned on, then the new addresses can be added only from the Address tab.

3 Enter an address name in the Address Name field (for example, Head Office Address).

   NOTE: The Address Name field is a required field, and can be used in searches. When you move to using shared addresses, carefully consider your naming standard for the address records. Recommendations include a concatenation of key address fields with a numeric suffix, or a combination of city and state (or province) with an externally generated ID. For example, if the address name is LebanonNJ38A08833, when searching for all address names starting with LebanonNJ, then you will find all the addresses in the borough of Lebanon that are in the state of New Jersey (NJ).

4 Complete the fields in the Address Information section as required.

   When you have completed the Address record, it is listed in the Address section of the Detail page. The Address field that is displayed is a concatenation of the existing address fields of the Address object. For example, if Address 1 is 43 2nd St., City is Newark, State is NJ, and Country is U.S.A, then the Address field on the Address section is displayed as: 43 2nd St., Newark, NJ, USA. For information about the Address record fields, see Address Fields (on page 367).

5 Click Save.

6 After saving the shared address information, complete the following steps, as required, by selecting Edit from the record-level menu for the address record:

a For accounts, dealers, or partners:

- If an address is used for billing purposes, select Billing for the address record.

- If an address is used for shipping purposes, select Shipping for the address record.

Oracle CRM On Demand copies the address information to the Billing or Shipping section, as appropriate.

b For contacts, if an address is a primary contact address, select Primary for the address record.

Oracle CRM On Demand copies the address information to the primary Contact section.

c For any of the four record types, to select the address type, use the Address Type picklist.

The following are the address types that are available by default: Residential, Office, Vacation Home, Other, Vanity, Private, Postal, Hospital, and Clinic.

NOTE: This field is required.

d Click Save.

To create a new shared address in account, contact, dealer, or partner records (alternate method)

1 On the Detail page for an account, dealer, or partner record, navigate to the Billing or Shipping address section.

On the Detail page for a contact record, navigate to the primary Contact address section.

2 Click the Lookup icon at the top right.

3 In the Address search window, you can create a new address by clicking New if address validation is not set up for your company.

NOTE: The New button is displayed only if address validation is turned off for the company. If address validation is turned on, then new addresses can be added only from the Address tab.

NOTE: If shared addresses are set up for your company, then the Billing, Shipping and primary Contact Address sections of the Detail pages are read-only.

4 Complete the fields for the new address in the Address window.

When you have completed the Address record, it is listed in the Account Address section of the Detail page. The Address field that is displayed is a concatenation of the existing address fields of the Address object. For example, if Address 1 is 43 2nd St., City is Newark, State is NJ, and Country is U.S.A, then the Address field on the Address section is displayed as: 43 2nd St., Newark, NJ, U.S.A. For information about the Address record fields, see Address Fields (on page 367).

5 Save the address record.

In the Detail page, Oracle CRM On Demand lists the new address in the Addresses section.

If the address record is a billing or shipping address on an account, dealer, or partner record, then Oracle CRM On Demand selects billing or shipping and populates the Billing or Shipping section in the record with the new address information. If the address record is a primary contact address, then

Oracle CRM On Demand selects Primary and populates the Contact address section in the record with the new contact address information.

Sharing Addresses Between Account, Contact, Dealer, and Partner Records

When shared addressing is configured for your company, you can add an existing address record, or edit an address that is listed in the Addresses section of an Account, Contact, Dealer, or Partner Detail page. Addresses that are common to account, contact, dealer, or partner records are linked by adding the same address record in the Detail page for each record.

Before you begin. The Addresses related information is not shown on the Account, Contact, Dealer, or Partner Detail pages by default. To allow you to see this information, your company administrator must grant access to the Addresses related information for your role. You or your company administrator must then add the Addresses related information to your Details page layout for the record type. For more information on customising your Detail page layouts, see Changing Your Detail Page Layout (on page 855).

To add an existing, shared address record to an account, contact, dealer, or partner record, the Enable Shared Addresses check box must be selected in your company profile. If the Validate Shared Address check box is selected in your company profile, only validated addresses can be added to the record in this procedure.

To share an address between account, contact, dealer, or partner records

1 On the Detail page for the record, navigate to the Addresses section if it is configured for the record.

2 In the Addresses section, click Add.

3 In the Address Edit window, click the address selector beside the Address field.

   NOTE: The Address Name field is read-only.

4 In the Address Search window, select an address from the list of validated addresses if address validation is turned on for your company, or select an address from the list of all available addresses if address validation is turned off.

   For information on validating addresses, see Marking Shared Addresses as Validated (on page 359).

   NOTE: If address validation is turned on for your company, and if the available addresses have not been validated, then no addresses will appear in the list of addresses for selection.

5 Select the address type from the Address Type picklist.

   The following are the address types that are available by default: Residential, Office, Vacation Home, Other, Vanity, Private, Postal, Hospital, and Clinic.

   NOTE: This field is required. You can associate the same address multiple times with the same account, the same dealer, the same partner, or with the same contact by using a different address type. For more information, see the Address Type field in Address Fields (on page 367).

6   For accounts, dealers, or partners, you can click Billing if the address is used for billing purposes, and click Shipping if the address is used for shipping purposes.

Oracle CRM On Demand copies the address information to the Billing or Shipping section, as appropriate.

NOTE: For multiple instances of shared addresses that use different address types, removing an instance or removing the Shipping or Billing flag for an instance, removes the Shipping or Billing flag on all instances of the shared address. For example, suppose you have three instances of a shared address that is named Cain Clinic, and the address is set to 123 Main Street, Lansdowne PA 19050. For this address, the first instance type is set to Office, the second instance type is set to Postal, the third instance type is set to Other, and all instances have the Shipping flag selected. If you delete any of the instances, for example, the Office type, or if you deselect the Shipping flag in the instance, then Oracle CRM On Demand deselects Shipping in all three instances (Office, Postal, and Other) of this address. Similarly, if all instances have the Billing flag selected and you deselect the Billing flag in one instance or if you delete an instance, then Oracle CRM On Demand also deselects the Billing flag for all three instances.

7   For contacts, you can click Primary if the address is a primary address.

8   Save the record.

Marking Shared Addresses as Validated

Oracle CRM On Demand changes the validation status of an address record from Not Validated to Validated if the Validation Date field is set in the Address Detail page. Typically, customers use their own methods, which are external to Oracle CRM On Demand, to determine whether addresses are valid, and then mark them as validated in Oracle CRM On Demand by setting the Validation Date field.

If address validation is set up for a company, then only addresses marked as validated are shown or added to lists in account and contact records, and you cannot add new addresses to accounts or contacts. However, you can add them to the Addresses homepage.

Before you begin. To mark Address records as validated, you require the Validate Shared Addresses privilege. Both the Enable Shared Addresses and the Validate Shared Addresses settings must be selected in the company profile, to set up address validation for a company.

To mark a shared address as validated

1   In an Address Detail page, click Edit.

2   Navigate to the Key Address Information section, and set the Validated Date field, using the date selector.

NOTE: You cannot set a validated date to a future date.

3   Save the address record.

Oracle CRM On Demand changes the validation status of the address record from Not Validated to Validated.

NOTE: The Validation Status field in the address record does not appear by default. Your company administrator must set it up.

Adding DEA Information to Contact Addresses

Contacts in the pharmaceutical or medical industry in the U.S. use a Drug Enforcement Administration (DEA) number to receive controlled substances from suppliers. For example, a physician might work in several different hospitals and require a different DEA number for each location to receive controlled substances or pharmaceuticals at each location. Complete the following procedure to add DEA numbers to a contact address record.

Before you begin. The DEA fields are not available on a Contact Address page by default. Your company administrator must customise the Contact Address Detail page and allow access for you to add DEA information to a contact address.

About DEA Numbers

A DEA number is a series of numbers assigned to a health care provider (such as a medical practitioner, dentist, veterinarian) allowing the provider to write prescriptions for controlled substances. The DEA number is used to track controlled substances. However, it is often used by the pharmaceutical or medical industry as a general prescriber number; that is, it is used as a unique identifier for anyone who can prescribe medication. A valid DEA number consists of: two letters, six numbers, and one check digit. The first letter is a code identifying the type of registrant. The second letter is the first letter of the registrant's last name. Of the seven digits that follow, the seventh digit is a checksum that is calculated as follows:

- Add together the first, third, and fifth digits. Call this SUM135.

- Add together the second, fourth and sixth digits and multiply the sum by 2. Call this DoubleSUM246.

- Add SUM135 and DoubleSum246. Call this CHECK.

- The rightmost digit of CHECK is used as the check digit in the DEA number.

For example, the DEA string *XY1234563* meets the requirements as follows:

    1 + 3 + 5 = 9

    2*(2+4+6) = 24

    9 + 24 = 33

The last digit is 3.

The registrant type (the first letter of the DEA number) can be one of the following:

- A - Deprecated (It can be used by some older entities.)

- B - Hospital/Clinic

- C - Practitioner

- D - Teaching Institution

- E - Manufacturer

- F - Distributor

- G - Researcher

- H - Analytical Lab
- J - Importer
- K - Exporter
- L - Reverse Distributor
- M - Mid-Level Practitioner
- N - Military Practitioner
- P - Narcotic Treatment Program
- R - Narcotic Treatment Program
- S - Narcotic Treatment Program
- T - Narcotic Treatment Program
- U - Narcotic Treatment Program
- X - Suboxone/Subutex Prescribing Program

To add DEA information to a contact address

1 On a Contact Detail page, navigate to the Addresses section, if this section is configured.

2 From the list of addresses, select Edit from the record-level menu (if shared addressing is configured), or Edit Rel (if shared addressing is not configured, and you are configured to access the top-level Address records).

3 Complete the DEA fields as described in the following table, and then save the Contact Address record.

DEA Field	Description
DEA Number	A valid DEA number.
DEA Issue Date	The date when the DEA number is issued from the Federal Government of the United States. Use the Date selector to specify the date.
DEA End Date	The date when the DEA number is no longer active or valid. Use the Date selector to specify the date. This field displays the DEA issue date plus three years by default.
DEA Active Flag	Read-only field. Oracle CRM On Demand determines whether the DEA number is active or inactive. Oracle CRM On Demand uses the DEA Issue Date, the DEA End Date, and the current date to determine the status.
Acceptable Schedules	A long text field where you can enter comma separated values for acceptable schedules, for example, Schedule 1, Schedule 2, Schedule 3, and so on. **NOTE:** This field does not affect any Oracle CRM On Demand processing.

Creating New Unshared Addresses in Account, Contact, Dealer, or Partner Records

To create a new unshared address in account, contact, dealer, or partner records, complete the fields in the Addresses section in the Detail page for the record.

Before you begin. The Addresses related information is not shown on the Account, Contact, Dealer, or Partner Detail pages by default. To allow you to see this information, your company administrator must grant access to the Addresses related information for your role. You or your company administrator must then add the Addresses related information to your Details page layout for the record type. For more information on customising your Detail page layouts, see Changing Your Detail Page Layout (on page 855).

To create a new unshared address record in an account, contact, dealer, or partner record, the Enable Shared Addresses setting must be deselected in your company profile.

To create a new unshared address in account, contact, dealer, or partner records

1 On an Account, Contact, Dealer, or Partner Detail page, navigate to the Addresses section if the section is configured.

2 To add a new unshared address, click New.

3 In the Edit Address page, select the applicable country for the address from the Country picklist, and complete the remaining address fields for the record.

    NOTE: Oracle CRM On Demand adjusts the address fields to follow the addressing conventions of the country. For more information on mapping the address conventions, see About Countries and Address Mapping.

4 Save the address in the Addresses section.

To create a new unshared billing or shipping address in account, dealer, or partner records

1 On an Account, Dealer, or Partner Detail page, navigate to the Billing or Shipping sections under Additional Information.

2 Click the edit icon in the upper right to edit the billing or shipping unshared address fields.

3 Select the applicable country for the address from the Country picklist, and complete the remaining billing or shipping address fields for the record.

    NOTE: Oracle CRM On Demand adjusts the address fields to follow the addressing conventions of the country. For more information on mapping the address conventions, see About Countries and Address Mapping.

4 Save the shipping or billing address.

The shipping or billing address is listed in the Addresses related information section for the record, with the billing or shipping setting selected, as applicable.

To create a new unshared primary address in contact records

1 On a Contact Detail page, navigate to the Contact section under Additional Information.

2 Click the edit icon in the upper right to edit the contact unshared address fields.

3 Select the applicable country for the address from the Country picklist, and complete the remaining contact address fields for the record.

NOTE: Oracle CRM On Demand adjusts the address fields to follow the addressing conventions of the country. For more information on mapping the address conventions, see About Countries and Address Mapping.

4 Save the contact address.

The contact address is listed in the Addresses related information section for the record, with the Primary setting selected.

Removing Addresses from Accounts, Contacts, Dealers, or Partners

To remove an address record from accounts, contacts, dealers, or partners, complete the following procedure.

To remove an address from an account, contact, dealer, or partner record

1 On the Detail page for the record, navigate to the Addresses section if it is configured for the record.

2 In the Addresses section, click Remove in the record-level menu for the address record.

If the address is shared, then Oracle CRM On Demand removes the address from the Detail page for the record; that is, it removes the association between the address and the parent record. However, the address record is not deleted and continues to exist. For information on deleting a shared address, see Deleting Shared Addresses (on page 363).

If the address is unshared, then Oracle CRM On Demand deletes the address from the Detail page for the record.

Deleting Shared Addresses

When deleting a top-level shared address record, Oracle CRM On Demand removes all denormalised fields to the associated account, contact, dealer or partner records.

NOTE: If you delete a shared address, then it is deleted   from all records in which it is shared, that is, account, contact, dealer, and partner records. However, it is not deleted from any associated call activity records. For example, if the shared address is included as part of the associated contact in a contact call, then deleting the shared address does not remove the address from the contact call. However, it is removed from the contact record.

Example of the Removal of Denormalised Fields When Deleting a Shared Address

Consider the following example, where the top-level shared address is 550 Walnut Lane, Swarthmore PA 19050, USA. Two accounts and eight contacts are using this shared address. One account has the address listed as the billing address, while the other account has it listed as the shipping address. Five of the eight contacts have this address as their primary address. When the shared address is deleted, Oracle CRM On Demand does the following:

■ Deletes the associations with the accounts and contacts

■ Clears the billing address information from the account where it was listed as a billing address

■ Clears the shipping address information from the account where it was listed as a shipping address

■ Clears the contact address information from the five contacts where it was listed as a primary address

Considerations for Restoring a Deleted Shared Address

If you restore a deleted address, you must update the Billing and Shipping settings because when Oracle CRM On Demand restores the address record, it does not restore the address settings to the original values. You must readjust these values to avoid the creation of erroneous data. For example, consider the following:

■ Shared Address 1 for Account 1 is marked as a billing address, and you delete Shared Address 1.

Oracle CRM On Demand clears the billing address fields for Account 1.

■ You then associate a new Shared Address 2 as the billing address.

Oracle CRM On Demand populates the Account 1 billing address fields with those of Shared Address 2.

■ You restore Address 1 from the Deleted Items list.

Oracle CRM On Demand restores Address 1 to the Addresses list and reassociates this shared address to Account 1, but does not restore the original Billing setting.

Address 2 and Address 1 appear in the list of addresses associated with Account 1. Address 2 remains the billing address with the appropriate fields denormalised to the account, until you manually reset Billing to Address 1.

NOTE: You cannot have more than one billing or shipping address in an account, dealer, or partner record, so you must readjust the Billing and Shipping settings in this situation when an address is restored. This also applies to the Primary setting for restored contact addresses.

For more general information about deleting and restoring records, see Deleting and Restoring Records (on page 161).

To delete a shared address

1   Navigate to the shared Address List page.

2   On the record-level menu for the shared address, click Delete.

3   Click OK on the confirmation window.

About Linking Records to Addresses

The following are some of the record types that you can link to addresses:

■   Account

■   Contact

■   Dealer

■   Partner

■   Custom Objects 1 to 15

You can link the Account, Contact, Dealer, or Partner records to track the record types associated with the address. You can also link shared address records to custom objects. However, you cannot link unshared address records to custom objects. For more information about linking records, see Linking Records to Your Selected Record (on page 104).

Viewing Address Records from Accounts, Contacts, Dealers, or Partners

To view an address associated with accounts, contacts, dealers, or partners, that is, for Account Address, Contact Address, Dealer Address, or Partner Address records, complete the following procedure.

To view an address record from accounts, contacts, dealers, or partners

1   On the Detail page for the record, navigate to the Addresses section if it is configured for the record.

2   For the Address record that you want to view, click View from the record level menu in the appropriate row.

Accessing a Map for an Address

You can access a map for an address record from within an address list or from the address section of a Detail page that contains an address section.

Before you begin: To access the Maps page, you must have the Maps Integration privilege in your user role.

To access a map for an address

1 Navigate to one of the following:

- The address section, for example, the Billing, Shipping, or Primary address section in the Detail page for the following record types: Address, Account, Contact, Dealer, Partner, Broker Profile, Lead, User, or Household

- The Addresses Related Item section in the Detail page for the Account, Contact, Dealer, or Partner record types

2 Perform one of the following:

- For an address section in a Detail page, click the map icon in the address section.

  NOTE: The map icon is also available in the Billing and Shipping address sections in the company profile. Your company administrator maintains the company profile.

- For an address list in the Addresses Related Item section, click Map from the drop-down list to the left of the address.

  NOTE: The Map link is not available in Address List pages.

Oracle CRM On Demand opens a map for the address if the mapping functionality can resolve the address location from the address information, as follows:

- If the address record contains a latitude and longitude but no other address information, then Oracle CRM On Demand opens the map with a pin at the location for the latitude and longitude and displays the latitude and longitude when you hover over the pin.

- If the address record contains the latitude and longitude along with other address information, then Oracle CRM On Demand opens the map with a pin at the location for the latitude and longitude, and displays the address information when you hover over the pin.

- If the address record contains address information but no latitude nor longitude, then Oracle CRM On Demand opens the map with a pin at the address location, and displays the address when you hover over the pin. If the mapping functionality cannot determine a location from the address information available, then it prompts you to choose an address from a list of suggested addresses determined from the available address information.

- If the address record contains neither address information nor latitude and longitude information, then Oracle CRM On Demand opens a map of North America.

NOTE: Address sections in broker profile and lead records do not contain fields to hold latitude and longitude information. Consequently, clicking the Map icon in the address section for a broker profile or lead record always redirects you to the Maps page where the mapping functionality initiates a search for the concatenated address.

Related Topics

See the following topics for related information:

- Addresses

- Working with the Address Homepage (on page 353)

- Maps (on page 375)

Address Fields

Use the Address Edit page to add an address or update details for an existing address. The Address Edit page shows all the fields that are available for an address.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Address Information	
Address Name	The name of the address record. This field has a limit of 50 characters. It must be unique and is required by default.
Validated Date	(Optional) The date when the address information has been validated by an external source. Use the date selector to specify or update this date. This date is relevant only if address validation is being used, otherwise it is ignored.
Address Type	This picklist field specifies the address type. The following are the address types that are available by default: Residential, Office, Vacation Home, Other, Vanity, Private, Postal, Hospital, and Clinic. (Required.) **NOTE:** This picklist field is not available when you are creating a new address record using the Address Edit page. It is only available when you edit a saved address record. For more information, see Creating New Unshared Addresses in Account, Contact, Dealer, or Partner Records (on page 362) and Setting the Address Type for Unshared Addresses Using Edit Rel.
Address Information	
Country	The country or territory used in the address record. Use the drop-down list to select a country or territory for your address. **NOTE:** The Address Information fields match the country-specific postal requirements. For example, the address fields for the United States use ZIP codes, while address fields for many other countries use postal codes. The following Address Information fields (Address1 and Address2) are shown if the Country field is not selected. For more information about postal requirements, see About Countries and Address Mapping.
Address1	Address line 1. Typically, this field holds the street address, for example, 10 Main Street. It has a limit of 200 characters. It is converted to the street numbering convention for the selected country (for example, number and street for Canada or U.S.A.). The conversion is based on the Country field.
Address2	Address line 2. This field handles any additional street address details. It has a limit of 100 characters.

Field	Description
Address3	Address line 3. This field handles any additional street address details. It has a limit of 100 characters. **NOTE:** This field is not present in the default layout of Address Edit or Detail page, if a country is not selected.
City	The city in the address record.
Province	The province or territory in the address record, for example, New Brunswick. **NOTE:** Oracle CRM On Demand changes this field to State, if the country selected uses States (for example, India or USA).
Post Code	The postal code for example, M1C 3J6, or the ZIP code for U.S.-based addresses, for example, 19050.
Description	This field has a limit of 100 characters.
Comments	This field has a limit of 1999 characters. **NOTE:** This field does not appear by default. Your company administrator must set it up.
Validated Status	Indicates whether the address has been validated or not and is calculated based on the Validated Date field. **NOTE:** This field does not appear by default. Your company administrator must set it up.

NOTE: The following fields used for geocoding functionality are also available through Web services. These geocoding fields do not appear by default. Your company administrator must set them up. These fields are read-only. For detailed   information on how to use these fields, see About the Geocoding of Address Information (on page 370).

Field	Description
Geocode Status	The status of the geocoding process for the address record. For new address records, Oracle CRM On Demand sets the field to a null value. If a geocoding succeeds for an address, Oracle CRM On Demand sets the field to Success. If the geocoding fails for an address, then Oracle CRM On Demand sets the field to Failed. If you edit an address, then Oracle CRM On Demand resets the field to a null value.
Geocode Match Code	The accuracy or quality of the geocoding process as indicated by a match code number. For a given match code, if multiple latitude and longitude matches are returned, Oracle CRM On Demand uses the first latitude and longitude match returned by Oracle Spatial.
Geocode Match Vector	A string of 17 characters that specifies the quality of matching of the input address attributes during the geocoding operation to derive the latitude and longitude associated with the address.

Related Topics

See the following topics for related information about shared addresses:

- Addresses

- Working with the Address Homepage (on page 353)

- Managing Addresses (on page 355)

About Geocode Fields in the Address Record Type

Oracle CRM On Demand provides the following geocode fields for the Address record type. These fields are not available by default.

■ Latitude

■ Longitude

Your company administrator must add these fields to the Address page layout if you require these fields. For information on adding fields to page layouts, see Customising Static Page Layouts.

Geocode fields are generally used to locate geographical coordinates commonly known as latitude and longitude from address values, such as the street address and the postal or ZIP code. These geocode fields are used to support mapping and location-based functionality in Oracle CRM On Demand client applications, such as Oracle CRM On Demand Disconnected Mobile Sales, or to pinpoint a location on a mapping application, such as Google Maps. If users do not populate these fields, then they are limited to using the standard-mapping functionality in the client applications using the available address values.

Latitude and longitude are typically represented using a degree, minute and second notation, for example 59°20'30"N. However, in Oracle CRM On Demand, they are represented and stored as decimal data with plus or minus signs, as follows:

■ For latitude, you can enter any values in the range -90.0000000 to +90.0000000, with a maximum of 7 digits after the decimal point. If the number of digits after the decimal point exceeds 7, then Oracle CRM On Demand rounds off the value. For example, Oracle CRM On Demand rounds up a latitude value of 89.12345678 to 89.1234568.

■ For longitude, you can enter any values in the range -180.0000000 to +180.0000000, with a maximum of 7 digits after the decimal point. If the number of digits after the decimal point exceeds 7, then Oracle CRM On Demand rounds off the values. For example, Oracle CRM On Demand rounds down a longitude value of 179.12345674 to 179.1234567.

In addition, Oracle CRM On Demand supports generic decimal format for latitude and longitude, that is, Oracle CRM On Demand supports numerals with a period (.) as the decimal separator. Some locales use a comma (,) as the decimal separator, however you must enter the decimal data using a period (.) as the decimal separator for these locales. Oracle CRM On Demand displays the decimal number as it is stored in its database and does not perform any local formatting of this decimal data.

To add latitude and longitude values into Oracle CRM On Demand, you must convert the degree-minute-second representation of latitude and longitude to decimal representation as follows:

    Decimal Degrees = Degrees + Minutes/60 + Seconds/3600

The latitude or longitude value must have a plus or minus sign because negative values are allowed. A positive latitude value is north (N) of the equator, while a negative latitude value is south (S) of the equator. A positive longitude value is east (E) of the Prime Meridian, while a negative longitude value is west (W) of the Prime Meridian. For example, the following table shows example values for the Latitude and Longitude fields in Oracle CRM On Demand for several cities.

City	Latitude	Latitude Value in Oracle CRM On Demand	Longitude	Longitude Value in Oracle CRM On Demand
Stockholm, Sweden	59°20'N	59.3333333	18°04'E	18.0666667
Darwin, Australia	12°27'S	-12.4500000	130°50'E	130.8333333

NOTE: Oracle CRM On Demand does not perform the conversion of latitude and longitude to the required representation in Oracle CRM On Demand. The Latitude and Longitude fields only store the geocodes associated with an address. Typically, Oracle CRM On Demand client applications, such as Oracle CRM On Demand Disconnected Mobile Sales, perform further processing and conversion of the geocode data. However, Oracle CRM On Demand can use the information in an address record to automatically find the corresponding latitude and longitude values for the address using Oracle Spatial and populate the Latitude and Longitude fields. For more information, see About the Geocoding of Address Information (on page 370).

About the Geocoding of Address Information

If Enable Geocoder is selected in the Company Profile page, Oracle CRM On Demand uses the information in an address record to find the corresponding latitude and longitude values for the address using Oracle Spatial and if successful, then populates the latitude and longitude fields in the address records with these values. This process of finding and populating the latitude and longitude from the address information is known as *geocoding*. Oracle CRM On Demand uses Oracle Spatial to asynchronously find the corresponding geocodes. Oracle CRM On Demand bypasses the geocoding of any records containing pre-existing values in the latitude or longitude fields.

Oracle CRM On Demand regeocodes the latitude and longitude fields when:

■ You clear the latitude and longitude fields

■ You edit the address fields

About the Geocoding Fields in Address Records

Address records contain three fields related to geocoding:

■ **Geocode Status.** The status of the geocoding process for the address record:

■ **Null value.** Address is not geocoded.

■ **Success.** Address successfully geocoded.

■ **Failed.** Address failed geocoding.

A geocoding failure typically occurs due to incorrect address data, the unavailability of a geocode for the address, or if the address match is too generic.

■ **Geocode Match Code.** How accurately the latitude and longitude matches with the given address as indicated by an integer value:

Geocode Match Code	Description
0	No geocoding match for the address.
1	Exact geocoding match for the address.
2	Geocoding match, with a compromise on match accuracy for the street type, or with the suffix or prefix portion of the street address.
3	Geocoding match, with a compromise on match accuracy for the house number portion of the street address.
4	Geocoding match, with a compromise on match accuracy for the street address.
10	Geocoding match, with a compromise on match accuracy for the ZIP or postal code.
11	Geocoding match, with a compromise on match accuracy for the city name.
12	Geocoding match, with a compromise on match accuracy for the ZIP or postal code and city.

Oracle CRM On Demand Customer Care configures an acceptable level for Geocode Match Code for your company. Oracle CRM On Demand saves the latitude and longitude fields returned from the geocoding process in an address record only when the match code is less than or equal to the level set by Oracle CRM On Demand Customer Care. This value is typically set to 3 by default.

If Oracle CRM On Demand does not find any matches in the geocoding process, it sets Geocode Match Code to 0 and does not populate the latitude and longitude in an address.

■ **Geocode Match Vector.** A string of 17 characters that provides a detailed summary of which parts of an address contributed to the accuracy or inaccuracy of the latitude and longitude returned for the input address. A question mark indicates an unused field position. Oracle CRM On Demand sets the Geocode Match Vector field for any addresses that are not geocoded to a series of question marks: ?????????????????. Each position contains a value ranging from 0 to 4.

The following table lists the positions within the string, and the address attribute corresponding to each position. The address attributes are not address fields in Oracle CRM On Demand but a conceptual representation of various address parts that constitute an address, like a house number or street prefix, and so on.

Position Within Geocode Match Vector	Address Attribute
0 to 4	Not used
5	Street Address - House Number
6	Street Address - Street Prefix
7	Street Address - Street Base Name
8	Street Address - Street Suffix

Position Within Geocode Match Vector	Address Attribute
9	Street Address - Street Type
10	Not used
11	City
12 to 13	Not used
14	State
15	Country
16	ZIP or Postal Code
17	Not used
NOTE: Oracle Spatial derives the Street Address attributes such as House Number or Street Prefix and so on by parsing the street address information contained in the Address1, Address2, and Address3 fields in an Oracle CRM On Demand address record. How Oracle Spatial derives these attributes varies by country.	

The numeric value to which Oracle CRM On Demand sets the position in the Geocode Match Vector string can vary from 0 to 4 as follows:

Geocode Match Vector Positional Value	Description
0 or 1	Oracle CRM On Demand has found an exact match for the address attribute during geocoding.
2 or 3	The address attribute is not null, however, Oracle CRM On Demand has not found a match for the attribute during geocoding.
4	The address attribute is null, but Oracle Spatial managed to find a close match, based on approximation.

For more information on these geocoding fields and other address fields, see Address Fields (on page 367).

Geocoding Example

The following example shows how you can use and interpret the geocoding fields, when Oracle CRM On Demand geocodes an address. Consider an address with the following field values:

Address Field in Oracle CRM On Demand	Value

Address Field in Oracle CRM On Demand	Value
Address Name	Ji Yang
Country	USA
Number/Street	1 Oracle Dr
Address 2	Nashua
Address 3	Not Set
City	Nashua
County	Not set
State	NH
Zip	03062

When Oracle CRM On Demand geocodes this address, Oracle Spatial decomposes the address and sets the address attribute values as follows:

Address Attributes in Oracle Spatial	Value
Name (from Street address)	Ji Yang
House Number (from Street address)	1
Street Name from Street field	Oracle Dr
City	Nashua
State	NH
Country	US
ZIP Code	03062

Oracle Spatial attempts to find a match based on these address attributes, by searching independently on individual attributes, and then using a combination of address attributes to find the best approximation for the latitude and longitude.

After successfully geocoding, Oracle CRM On Demand sets the fields as follows:

Oracle CRM On Demand Address Field	Value	Comment
Geocoding Status	Success	Geocoding is successful.
Geocoding Match Code	1	Oracle Spatial found an exact match.

Oracle CRM On Demand Address Field	Value	Comment
Longitude	-71.46006	None
Latitude	42.71004	None
Geocoding Match Vector	??030402010??000?	The Geocoding Match Vector for this example. The vector is set irrespective of whether the geocoding is successful or not. Even for a low match code of 4 where no latitude and longitude gets set, the vector is still set and details the attributes that contributed to the failure.

You can interpret the vector value of ??030402010??000? as shown in the following table:

Geocode Match Vector Position	Value	Address Attribute	Interpretation of the Match Vector Value
1	?	None	Not used
2	?	None	Not used
3	0	None	Not used
4	3	None	Not used
5	0	House Number	Exact match found for this attribute.
6	4	Street Prefix	Address attribute value is null, but a close match was found based on approximation.
7	0	Street Base Name.	Exact match found for this attribute.
8	2	Street Suffix	This address attribute has a value, but no match was found for the value.
9	0	Street Type	Exact match found for this attribute.
10	1	None	Not used
11	0	City	Exact match found for this attribute.
12	?	None	Not used
13	?	None	Not used
14	0	State	Exact match found for this attribute.

Geocode Match Vector Position	Value	Address Attribute	Interpretation of the Match Vector Value
15	0	Country	Exact match found for this attribute.
16	0	Postal Code	Exact match found for this attribute.
17	?	None	Not used

Related Topics

See the following topics for related information about addresses:

■ Addresses

■ Working with the Address Homepage (on page 353)

■ Managing Addresses (on page 355)

■ Address Fields (on page 367)

■ About Geocode Fields in the Address Record Type (on page 369)

Maps

Use the Maps page in Oracle CRM On Demand to find addresses on a map or to obtain driving directions to an address. To use the Maps page, you must have the Maps Integration privilege in your user role. In addition, your administrator must make the Maps tab available for your user role. If the Maps tab is not present in the tabs across the top of your pages in Oracle CRM On Demand after your administrator makes the Maps tab available to your user role, then you can add the Maps tab to your tab layout. For information about adding tabs to your tab layout, see Displaying Your Tabs (on page 854).

NOTE: To enable the Maps Integration privilege and make the Maps tab available to your role, your administrator must have the Manage Maps Integration privilege in her user role. If your administrator does not have the Manage Maps Integration privilege in her role, then the administrator must contact Oracle CRM On Demand Customer Care and ask to have the privilege enabled.

You can do the following in the Maps pages:

■ Find an address on a map.

■ Perform a proximity search to find addresses on records in Oracle CRM On Demand that are located within the following:

　■ The specified radius of your current location

　■ The specified radius of another location

■ Obtain driving directions to addresses on a map.

NOTE: With the exception of India and Singapore, the Map functionality provides addresses in the predominant language of the country or jurisdiction contained in the address. For example, for addresses in Qatar, the addresses are provided in Arabic, and for addresses in Russia, the addresses are provided in Russian, and so on. For addresses containing India and Singapore, the Map functionality provides the addresses in English. For Canada, the Map functionality provides the addresses in English except for Quebec, where addresses are provided in French.

When you perform a proximity search, you can restrict your search to a predefined list of records. For example, you might create a list of contacts that have the Partner contact type and then perform a proximity search on that list to find the partner contacts that are located no more than 10 miles from your current location or a location where you plan to be tomorrow.

The following table shows the pins that appear on the map.

Pin	Purpose
	Indicates your current location, if the maps functionality can determine your location
	Indicates the location of an address that is found in a proximity search
	Indicates the centre of a proximity search

If your current location can be determined, then a pin indicates your location on the map that appears when you open the Maps page. If your current location cannot be determined, then a map of North America is shown. The maps functionality determines your current location as follows:

■ If the computer that you are using receives global positioning system (GPS) information, then the maps functionality uses the GPS information to determine your current location.

■ If your computer does not receive GPS information, then the maps functionality uses the application programming interfaces (API) of your browser to determine your current location. The APIs use the IP address of your computer to determine your current location. If your computer points to a proxy server, then the location of the proxy server is shown as your current location.

NOTE: If you want your current location to be determined, then you must allow your browser to access your current location information. Depending on the browser that you use and the privacy settings that you select on the browser, you might be prompted to allow your browser to access your current location information. If you do not agree, then the default map of North America is shown instead of your current location.

In addition, the following table shows the target icons available on a map.

Icon	Purpose

Icon	Purpose
⊕	This icon is displayed when the page is not centred on your current location. Hovering over this icon displays *Show My Location.*
⊕	This icon is displayed only when the page is centred on your current location. Hovering over this icon displays *My Location.* Clicking this icon adjusts the magnification of the map to centre the location pin on the map.

If multiple records are plotted or pinned on the same latitude and longitude, then Oracle CRM On Demand displays a single pin for all of these records. Clicking the pin displays a list of all underlying record names and their associated addresses. You can select any record from this list to add the address to directions, or to set the address as a proximity centre. For more information on getting direction information, see Obtaining Driving Directions (on page 381), and for more information on proximity searches, see Performing Proximity Searches (on page 378).

Related Topics

See the following topics for related information:

■ Finding Addresses on Maps (on page 377)

■ Performing Proximity Searches (on page 378)

■ Obtaining Driving Directions (on page 381)

■ Accessing a Map for an Address (on page 365)

Finding Addresses on Maps

This topic describes how to find addresses in the Maps page in Oracle CRM On Demand.

NOTE: If your current location can be determined, then a pin indicates your location on the map that appears when you open the Maps page. If your current location cannot be determined, then a map of North America is shown.

Before you begin. To use the Maps page, you must have the Maps Integration privilege in your user role. In addition, your administrator must make the Maps tab available for your user role. If the Maps tab is not present in the tabs across the top of your pages in Oracle CRM On Demand after your administrator makes the Maps tab available to your user role, then you can add the Maps tab to your tab layout. For information about adding tabs to your tab layout, see Displaying Your Tabs (on page 854).

To find an address on a map

1 Click the Maps tab.

2 In the Maps page, in the search pane, type in the address that you want to find.

You must use commas to separate the elements of the address, and you must enter the country name or code as the last element in the address. The format of the address can vary depending on the country. Searches are not case-sensitive. The following are some examples of how you might enter an address:

■ Avenida Vitacura 2939 Piso 6, Las Condes, Santiago, Chile

■ 5805 Owens Drive, Pleasanton, CA 94588, USA

■ Unit 6, IDA Business Park, Dangan, Galway, IE

■ Leela Infopark, 10th Floor, technopark campus, Plot No. 02, Kariavattom P.O., Trivandrum, KL 695581, In

You can also enter the name of a city and a country. In this case, the Maps functionality returns the default street address for that city and country. For multiple matches, the search displays the available matching addresses that it finds and prompts you to select one of the addresses. For example, if you enter the string *Toronto, Canada* in English, then the search returns two addresses. One is the default address for Toronto in Prince Edward Island, and the other is the default address for Toronto in Ontario, both of which are in Canada. Oracle Maps provides the addresses.

3 Click the magnifying glass icon.

On the map, a pin indicates the location of the address. If more than one match is found for your search criteria, then the matches are shown in a list and you can select the correct match. Up to 10 matches are listed initially. If more than 10 matches are found, then you can scroll to see additional matches.

Related Topics

See the following topics for related information:

■ Maps (on page 375)

■ Performing Proximity Searches (on page 378)

■ Obtaining Driving Directions (on page 381)

Performing Proximity Searches

In a proximity search, Oracle CRM On Demand checks the addresses that are stored on records of a given record type to determine whether the addresses are within the radius that you specify for the search. If Oracle CRM On Demand finds an address that is within the radius of the search, then a pin is placed on the map to indicate the address location. You can see the name and address of the record that is associated with a pin when you rest your pointer on the pin.

Proximity searches are based on the information in the Latitude and Longitude fields in the addresses that are searched. Therefore, you must ensure that these fields are populated correctly in the relevant addresses if you want the addresses to be found by a proximity search. For more information about the Latitude and Longitude fields, see About Geocode Fields in the Address Record Type (on page 369).

The following table lists the record types that support proximity searches and shows the address type that is checked on each record type when you perform a proximity search.

Supported Record Type	Address Checked in Proximity Searches
Account	The shipping or billing address for the account
Activity	The address in the Address field on the activity, for example, the address in a contact call.
Contact	The primary address for the contact

NOTE: If your current location can be determined, then a pin indicates your location on the map that appears when you open the Maps page. If your current location cannot be determined, then a map of North America is shown.

Before you begin. To use the Maps page, you must have the Maps Integration privilege in your user role. In addition, your administrator must make the Maps tab available for your user role. If the Maps tab is not present in the tabs across the top of your pages in Oracle CRM On Demand after your administrator makes the Maps tab available to your user role, then you can add the Maps tab to your tab layout. For information about adding tabs to your tab layout, see Displaying Your Tabs (on page 854).

The following procedure describes how to perform a proximity search to find accounts or contacts that are located within a specified radius of your current location.

NOTE: A proximity search returns the location of the first 500 records that are within the specified radius.

To perform a proximity search within a specified radius of your current location

1 Click the Maps tab.

2 In the Maps page, in the search pane, click the double arrows to show the search criteria fields in the Around Me tab.

3 In the Around Me tab of the search pane, enter the criteria for your search, and then click the magnifying glass icon.

   NOTE: You can find information about the search criteria fields in the table at the end of this topic.

   Pins appear on the map to indicate the locations of the addresses that are found within the specified radius.

4 To see the name and address of the record that is associated with a pin in the map pane, rest your pointer on the pin.

5 To clear the results of the proximity search plotted as pins on the map, click Clear Results at the bottom of the Around Me tab.

The following procedure describes how to perform a proximity search within a specified radius of a location that you select.

NOTE: If you want to use a specific address as the centre for your proximity search, and if that address is not already indicated by a pin on the map, then search for the address before you perform your proximity search. For more information, see Finding Addresses on Maps (on page 377).

To perform a proximity search within a specified radius of a location that you select

1 In the Maps page, on the map, set the centre for your proximity search.

Perform one of the following:

■ On the map, click a pin that indicates the address that you want to use as the centre for your proximity search, and then click Set as Proximity Centre.

■ On the map, right-click any location that you want to use as the centre for your proximity search, and then click Set as Proximity Centre.

NOTE: If the address that you want to use as the centre for your proximity search is not already shown on the map, then search for it, as described in Finding Addresses on Maps (on page 377).

The centre that you set for the proximity search is indicated by a pin.

2 In the search pane, if the search criteria fields in the Around Me tab are not visible, then click the double arrows to show the fields.

3 In the Around Me tab of the search pane, enter the criteria for your search, and then click the magnifying glass icon.

Pins appear on the map to indicate the locations of the addresses that are found within the specified radius.

4 To see the name and address of the record that is associated with a pin in the map pane, rest your pointer on the pin.

5 To clear the results of the proximity search plotted as pins on the map, click Clear Results at the bottom of the Around Me tab.

The following table describes the criteria fields for a proximity search.

Search Criteria Field	Description
Select Record Type	Select the record type that you want to search for, such as Account, Activity, or Contact. This field is required for a proximity search.
Address Type	This picklist applies only for an account proximity search, and can have the following values: ■ **Shipping Address.** The proximity search for the account is limited to the shipping address. ■ **Billing Address.** The proximity search for the account is limited to the billing address. This is the default value.
Select List	Select the list that you want to search. All of the lists that are available to you for the record type are available for you to select in this field.
Radius	Select the radius for the proximity search. The available options are 1, 5, 10, 20 and 25. If you do not select a value, then a default value of 10 is used for the search.

Search Criteria Field	Description
Units	Select the units in which the radius is measured. The available options are miles and kilometres.

Related Topics

See the following topics for related information:

- Maps (on page 375)
- Finding Addresses on Maps (on page 377)
- Obtaining Driving Directions (on page 381)

Obtaining Driving Directions

This topic describes how to obtain driving directions to addresses on the Maps page in Oracle CRM On Demand.

NOTE: If your current location can be determined, then a pin indicates your location on the map that appears when you open the Maps page. If your current location cannot be determined, then a map of North America is shown.

Before you begin. To use the Maps page, you must have the Maps Integration privilege in your user role. In addition, your administrator must make the Maps tab available for your user role. If the Maps tab is not present in the tabs across the top of your pages in Oracle CRM On Demand after your administrator makes the Maps tab available to your user role, then you can add the Maps tab to your tab layout. For information about adding tabs to your tab layout, see Displaying Your Tabs (on page 854).

To obtain driving directions

1 Click the Maps tab.

2 Add a starting point and destination for the driving directions, also known as the start point and stop point, using one of the following methods on the Maps page:

- In the search pane, click the double arrows, and in the Directions tab, enter the address for the start point in the field labelled A, and then enter the address for the destination or stop point in the field labelled B.

  You must use commas to separate the elements of the address, and you must enter the country name or code as the last element in the address. The format of the address can vary depending on the country.

  For a list of countries and their two-letter country codes that are supported by Oracle Maps, see the Oracle Maps Geocoder Metadata Web page (http://elocation.oracle.com/geocoder/metadata.jsp). For more information on the address formats supported by Oracle Maps, see the Oracle Maps Geocoder Concepts Web page http://elocation.oracle.com/geocoder/concept.html.

■ Right-click the starting location on the map, and then select Add to Directions to add the start point to the field labelled A in the Directions tab. Then right-click the destination location, and select Add to Directions to add the stop point to the field labelled B.

■ Click a pin on the map, and select Add to Directions to add the start point in the field labelled A in the Directions tab. Then click the destination pin, and select Add to Directions to add the stop point to the field labelled B.

You can mix and match these methods to add start and stop points as required.

NOTE: If you enter an address in the search field in the search pane, and if a start point (A) and stop point (B) exist in the Directions tab, then the address is added as a stop point (C) when you perform the search.

3   Click the magnifying glass icon.

In the Directions tab, Oracle CRM On Demand starts the driving directions. The directions, or route card, provide the possible driving routes and include the estimated time and distance for each route, similar to the driving directions information from commercially available Global Positioning Systems. Oracle CRM On Demand also plots the destination labels and route on the map.

If you enter multiple destination stop points, for example, start point A with stop points B and C, then the driving information includes the directions from start point A to stop point B, and then from stop point B to stop point C. If you want to obtain directions from your current location to a stop point, then include your current location as the start point by clicking the My Location pin, and then clicking Add to Directions.

NOTE: The driving directions are based on the closest street information for the address available from Oracle Maps. Consequently, the stop point labels might not be pinned to the exact address on the map.

4   To centre a stop point in your map view, click the stop point label, for example B, C, and so on, in the route card.

Centring the stop point in your view is only functional if the route is displayed on the map. If you clear the route by clicking the x icon in the route card or by altering the stop points, or if you have not clicked the magnifying glass after entering the stop points, then the map will not centre on the stop points.

5   To clear the results obtained for the driving directions, click x in the route card.

The route is also cleared if you alter the existing stop points, for example, if you edit a stop point, remove a stop point, or reverse the order of the stop points.

6   To print the driving directions, click the Printer icon on the driving results card:

The print preview window that opens displays a snapshot of the map with driving directions. The preview includes all stop points, the stop point addresses, the time and distance summary for the trip, and the map showing all available routes. Following the map image is a table of driving directions with the estimated driving time. The stop points in the table are colour coded to match the stop point pin colour on the map.

In addition, the options described in the following table are available as links in the bottom of the Directions tab.

Option	Description
Add Stop-Point	Select this option to add more destination stop points, up to a maximum of four stop points. A start point and a stop point are available by default.
More Options	Select this option to specify additional preferences for the driving directions, such as: ■ **Route preference.** Fastest or shortest. Fastest is the default. ■ **Road preference.** Highway or local roads. Highway is the default. ■ **Distance units.** Imperial or metric. Imperial is the default. ■ **Language.** Available languages for driving directions are English, French, German, Italian, and Spanish. English is the default.
Reverse Addresses	Select this option to reverse the order of the start and stop points in the route card.

Related Topics

See the following topics for related information:

■ Maps (on page 375)

■ Finding Addresses on Maps (on page 377)

■ Performing Proximity Searches (on page 378)

5 Business Planning

This topic introduces the Business Planning features available with Oracle CRM On Demand.

About Business Planning

Oracle CRM On Demand supports the management of accounts and contacts. This management includes handling the profiles of the account and related contacts, the account and contact relationships, and creating an overall plan for how to effectively allocate funding and resources associated with an account.

As sales and marketing teams move from a product-centred strategy to an account-based (or customer-based) sales strategy, key account selling and strategic business planning become critical for success. Sales and marketing teams define the following:

- Potential opportunities for the business

- Strategic goals

- Lists of defined activities to meet these goals and win opportunities

- Strategic goals for an entire account

- Tangible goals with the appropriate definition of the potential opportunity

Oracle CRM On Demand supports selling strategies and processes to manage your key accounts that enable your account teams to create and manage the following:

- Business and engagement plans

- Related objectives

- Opportunities

- Activities

NOTE: The Business Plan, Objective, Plan Account, Plan Contact, and Plan Opportunity functionality was developed in the context of Oracle CRM On Demand Life Sciences Edition, however, all Oracle CRM On Demand customers can access and use this functionality. Your company administrator can enable this functionality for your use.

Scenarios for Business Planning

The following topics provide examples of how Oracle CRM On Demand business planning functionality might be used. You might use this functionality differently, depending on your business model.

- Scenario for Managing Plans for a Single Account (on page 386) (Account Centric)

- Scenario for Managing Plans for a Group of Accounts or Territories (on page 387) (Account Centric)

■ (Contact Centric)

■ (Product Centric)

Scenario for Managing Plans for a Single Account

This scenario gives one example of how Oracle CRM On Demand business planning functionality might be used. You might use the Oracle CRM On Demand business planning functionality differently, depending on your business model.

In this scenario, an account manager is responsible for managing plans for single accounts. The account manager uses sophisticated functions to manage large and complex accounts (for example, a multinational company) compared with a simple account (such as a home-based business). Such an account has multiple plans for different periods or even within the same period for different account managers. For example, a general account manager or a special products account manager might have different plans.

The account manager performs the following tasks to manage the plans for an account:

1 Before the planning period, the account manager creates a business plan for each account. The plan establishes the high-level quantitative and qualitative goals for the account for the associated period. An annual plan and child quarterly plans are usually available, particularly for important accounts. The key metric for the business plan is revenue. Typically, a plan for a large customer contains child plans for different operating units and territories, and so on, but all plans are managed as one account. For information on how to set up a business plan, see Business Plans (on page 389).

2 In the approval process for the business plan, the account manager changes the status of the plan from Draft to Submitted. Other key personnel review and edit the plan. The account manager approves the plan, changing the status to Final Approved. At the end of the planning period, the account manager can change the status to Expired to reduce the number of active plans.

3 The account manager completes additional details of the business plan; that is, the objectives. Objectives are goals that are at a lower level in the plan. For example, an objective might be to conduct a certain number of sales calls. The account manager can associate specific activities and opportunities with either a business plan or an objective.   For information on how to set up an objective, see Objectives (on page 395).

4 As sales opportunities arise, the account manager enters the opportunities, associating them with either the plan or objective. For information on how to set up opportunities, see Opportunities (on page 315).

While performing the planning activities, the account manager can do the following:

■ View plans, objectives, opportunities, and activities that are explicitly associated with an account and any associated account contacts

■ View any objectives that apply to all accounts

■ Review existing activities continuously, and create follow-up activities and opportunities

Scenario for Managing Plans for a Group of Accounts or Territories

This scenario gives one example of how Oracle CRM On Demand business planning functionality might be used. You might use Oracle CRM On Demand business planning functionality differently, depending on your business model.

In this scenario, which is a variation of Scenario for Managing Plans for a Single Account (on page 386), an account manager or sales manager performs the business planning for groups of accounts. Examples of these groups of accounts include an account manager's entire territory, a *brick* (a collection of accounts and contacts, normally in a common geographic area), a larger region, a market channel or segment, or a group of small accounts that do not warrant individual plans. Typically, the users performing the Scenario for Managing Plans for a Single Account (on page 386) also perform this scenario.

The account manager or sales manager performs the following tasks to manage plans for the group of accounts or territory:

1 Before the planning period, the account manager creates a business plan for each account. The plan establishes the high-level quantitative and qualitative goals for the account for the associated period. Typically, an annual plan and child quarterly plans are available, particularly for important accounts. The key metric for the business plan is revenue. Typically, there are always quarterly child plans and perhaps monthly child plans for lower-level planning. Certain fields, such as Contacts, might be left empty. Plans might exist at multiple levels of the hierarchy, such as territory, region, country, which can be created by recursive relationships in the Business Plan record type. The account manager creates the highest-level plan first, so that other personnel can create child plans below the parent in the hierarchy. For information on how to set up a business plan, see Business Plans (on page 389).

2 In the approval process for the business plan, the account manager changes status of the plan from Draft to Submitted. Other key personnel review and edit the plan. The account manager approves the plan, changing the status to Final Approved. At the end of the planning period, the account manager can change the status to Expired to reduce the number of active plans.

3 The account manager completes the details of the business plan, namely the objectives. Objectives are goals that are at a lower level in the plan. For example, an objective might be to conduct a certain number of sales calls. The account manager can associate specific activities and opportunities with either a business plan or an objective. For information on how to set up an objective, see Objectives (on page 395).

While performing the planning activities, the account manager can do the following:

■ View plans, objectives, opportunities, and activities that are explicitly associated with an account and any associated account contacts.

■ View any objectives that apply to all accounts.

■ Review existing activities continuously, and create follow-up activities.

Scenario for Managing Plans for Contacts

This scenario gives one example of how Oracle CRM On Demand business planning functionality might be used. You might use Oracle CRM On Demand business planning functionality differently, depending on your business model.

In this scenario, an account manager is responsible for managing plans for contacts, independent of the contact's relationship to an account. For example, the contact is a key opinion leader, a consultant, or researcher whose influence goes beyond the associated accounts.

The account manager or industry liaison performs the following tasks to manage the plan for a contact:

1   The account manager creates a business plan for each contact, prior to the planning period. The plan establishes the high-level goals for the contact for the associated period. An annual plan and typically child quarterly plans are available, particularly for important contacts.

    Goal-related fields are likely to be qualitative targets rather than revenue targets. It is unlikely that any type of hierarchy exists, which is similar to the hierarchy of account plans that correspond to the overall account, operating units, and so on. For information on how to set up a business plan, see Business Plans (on page 389).

2   In the approval process for the business plan, the account manager changes the status of the plan from Draft to Submitted. Other key personnel review and edit the plan. The account manager approves the plan, changing the status to Final Approved. At the end of the planning period, the account manager can change the status to Expired to reduce the number of active plans.

3   The account manager completes the objectives. Objectives are goals that are at a lower level in the plan. For example, an objective can be to deliver a certain number of academic presentations. The account manager can associate specific activities and opportunities with either a business plan or an objective. For information on how to set up an objective, see Objectives (on page 395).

4   As opportunities arise (for example, an opportunity to deliver a lecture or fund research),   the account manager enters the opportunities, associating them with either the plan or objective. For information on how to set up opportunities, see Opportunities (on page 315).

While performing the planning activities, the account manager can do the following:

■   View plans, objectives, opportunities, and activities that are explicitly associated with a contact and associated accounts.

■   View any objectives that apply to all contacts.

■   Review existing activities continuously, and create follow-up activities and opportunities.

Scenario for Managing Plans for Objectives and Products

This scenario gives one example of how Oracle CRM On Demand business planning functionality might be used. You might use Oracle CRM On Demand business planning functionality differently, depending on your business model.

In this scenario, an account manager is responsible for managing business plans that focus on plans, objectives, and products. The plans might be applied to a broad group of accounts. For example, for a strategic product launch, senior sales or marketing management creates business plans and objectives that are applied to all accounts (or a relevant subset), regardless of the specific detail in the individual account plans.

The senior sales management or marketing management with senior sales management approval typically perform the following tasks to manage the plan. How they manage the plan depends on how their organisation implements access controls.

1   At the beginning of the annual and quarterly planning periods, the marketing manager creates the business plans for some product marketing initiatives. While the marketing organisation might have a separate system for comprehensive, product-business planning, its use in this scenario is for high-priority initiatives that require special attention from the sales team. The business plans establish high-level quantitative and qualitative goals during the associated period. There might be an annual plan and child quarterly plans. The key metrics for the business plans typically include revenue. For information on how to set up a business plan, see Business Plans (on page 389).

2   The marketing manager might change the status of the business plans from Draft to Submitted. The required managers review, edit, and approve plans by changing the status to Final Approved. At the end of the planning period, the marketing manager changes the status of the plan to Expired to reduce the number of inactive plans.

3   The marketing manager adds more details to the plan, namely the objectives. Objectives are goals that are at a lower level in the plan, for example, activate sampling, or perform activities: make specific calls, visits, and so on. The marketing manager can associate the activities with either the business plan or the objectives. For information on how to set up an objective, see Objectives (on page 395).

4   The marketing manager applies the plan or objective to a group of accounts. The plan can apply to all accounts or a subset of accounts that are relevant to a particular product. The marketing manager attaches the business plan or objective to each relevant account. The account   manager executes and evaluates the business plan or objective.

5   As sales opportunities arise, the account or marketing manager enters the opportunities, associating them with either the plan or objective. For information on how to set up opportunities, see Opportunities (on page 315).

While performing the planning activities, the account or marketing manager can do the following:

■   View plans, objectives, opportunities, and activities that are explicitly associated with an account and any associated account contacts.

■   View any objectives that apply to all accounts.

■   Review existing activities continuously, and create follow-up activities and opportunities.

Business Plans

Use the Business Plan pages to create, update, and track business plans for accounts, contacts, or products. A *business plan* allows sales organisations to set strategic goals (for example, revenue targets) and action plans to achieve those goals, in the form of objectives, activities, and opportunities.

You can use business plans in a number of ways to accommodate company-specific planning processes. For example, you can create plans for individual accounts (for example, at the headquarters or territory level), or for a number of accounts (for example, all accounts in a sales representative's territory). You can create plans for contacts independent of their account affiliation, which is useful for managing relationships with key-opinion leaders, whose influence in an industry or field extends beyond their own account affiliation (for example, an influential medical researcher). You can create plans for products, for instance, to plan the launch of a new product that will be sold to multiple accounts. For all these business plan types, the planning horizon can be short or long term. The business plan type is based on company-defined planning periods, typically months, quarters, and years.

Users can create hierarchies of business plans. A given business plan can have multiple child plans. Furthermore, a given plan can have associated objectives (for more information on objectives, see Objectives (on page 395)). A business plan sets high-level strategic goals, such as a revenue target. However, an objective sets a tactical goal, such as completing a number of sales calls, or attaining a certain number of new prescriptions at a medical practice.

Using business plans, you can integrate customer relationship management with business-planning tasks, workflows, and deliverables during the business-planning life cycle. By supporting the creation and management of account plans, a business plan supports selling to accounts and managing sales. A business plan consists of some general, plan information, and includes related plan objectives, opportunities, and activities. This plan information is also related to accounts because a business plan can be created for one account, for example, an account group parent and applied to a number of other accounts in a group.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking business plan information, the Business Plan tab might be excluded from your set-up.

Working with the Business Plan Homepage

The Business Plan Homepage is the starting point for managing business plans.

NOTE: Your company administrator can customise the layout of your Business Plan Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Business Plan

You can create a new business plan by clicking the New button in the Recently Viewed Business Plans section. For more information, see Creating Records (on page 51) and Business Plan Fields (on page 393).

Working with Business Plan Lists

The Business Plan Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for business plans.

Business Plan List	Filters
All Business Plans	All business plans to which you have visibility, regardless of who owns the

Business Plan List	Filters
	business plan.
Recently Modified Business Plans	All business plans with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Business Plans

The Recently Modified Business Plans section shows the business plans that you viewed most recently.

Click Show Full List to expand the list.

Adding Sections to your Business Plan Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Business Plan Homepage:

■ Recently Created Business Plans

■ Recently Modified Business Plans

■ My Recently Created Business Plans

■ My Recently Modified Business Plans

■ Additional report sections (Your company administrator can make report sections available for display on your Business Plan Homepage.)

To add sections to your Business Plan Homepage

1 On the Business Plan Homepage, click Edit Layout.

2 On the Business Plan Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page. Click Save.

Related Topics

See the following topics for related information about business plans:

■ Business Plans (on page 389)

■ Business Plan Fields (on page 393)

■ Managing Business Plans (on page 392)

Managing Business Plans

For step-by-step procedures for managing business plans, see:

■ Linking Records to Business Plans (on page 393)

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

■ Using Assessment Scripts (on page 156)

■ Sharing Records (Teams) (on page 134)

■ Working with Attachments (on page 147)

■ Viewing Audit Trails for Records (on page 164)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

User Role and Access Profile Settings

To work with the Business Plan pages, you must have the following privileges in your user role:

■ Manage Business Planning Access

■ Manage Period Administration

In addition, your access profile settings must allow you to access the following record types:

■ Business Plan

■ Objective

■ Plan Account

■ Plan Contact

■ Plan Opportunity

Related Topics

See the following topics for related information about business plans:

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Linking Records to Business Plans

You can link additional records to the business plan by adding sections to the Detail Page for the business plan record:

■ Plan Accounts

■ Plan Contacts

■ Business Plans

■ Objectives

■ Plan Opportunities

■ Activities

NOTE: A particular business plan can relate to multiple items of all the above entities. The entities prefaced with the term, *Plan,* are special entities that allow many-to-many relationships. A business plan, objective, or activity can relate to only one parent business plan. However, a plan account, plan contact, or plan opportunity allows multiple parent business plans. Allowing multiple parent plans accommodates the required flexibility in relating these entities to business plans.

For more information, see Changing Your Detail Page Layout (on page 855).

To link records to a business plan

1 On the Business Plan Detail page, click Edit Layout.

2 On the Business Plan Detail Layout page, click the arrows to add the section for the record, and to organise the sections on the page.

3 Click Save.

Business Plan Fields

Use the Business Plan Edit page to add a business plan, or update details for an existing business plan. The Business Plan Edit page shows the complete set of fields for a business plan.

TIP: You can also edit business plans on the Business Plan List page and the Business Plan Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the Business Plan fields.

Field	Description
Key Plan Information	
Plan Name	The name of the business plan. (Required.)
Period	Specifies the period during which to complete the business plan. A planning period follows your company's fiscal calendar definition, as determined by your company administrator.
	A period can correspond to a fiscal year, quarter, month, or week, for example, Fiscal Quarter 1 2010. The available periods listed are based upon your company's defined fiscal calendar. For more information on defining fiscal calendars, see About Fiscal Calendars.
	NOTE: You require the Manage Period Administration privilege to select a period.
Period: Start Date	The starting date of a period. Click the Calendar icon to select the start date.
Period: End Date	The ending date of a period. Click the Calendar icon to select the end date.
Type	The business plan type. Choose the applicable type of business plan from the drop-down list. Example plan types are: Account, Local, Regional, National, Market Segment, Engagement, or Brand. (Required.)
Status	The business plan status. Choose the current status of the business plan from the drop-down list. Examples of the plan status are: Draft, Submitted, Final Approved, Current, Expired, Future, On Hold. (Required.)
Owner	The owner of the business plan record.
	Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Description	The description of the business plan.
Product Name	The name of the product associated with this plan. Click the Lookup icon to choose a product.
Plan Revenue	The expected revenue associated with this plan.
Currency	The currency for any monetary amounts in this plan.
Exchange Date	The relevant date for converting any local revenue amounts to currencies used at headquarters.

Field	Description
Account	The account associated with this business plan. Click the Lookup icon to choose an account.
	This field can be used in the case of a one-to-one relationship between the business plan and a specific account. If the business plan has more than one account associated with it, then use the intersection entity Plan Accounts to form the relationship.
	NOTE: The Account field is not available by default. To add this field to the Business Plan Detail page, contact your company administrator.
SWOT Analysis	
Strengths	Competitive strengths with respect to achieving this plan. (This field has a limit of 240 characters.)
Weakness	Competitive weaknesses with respect to achieving this plan. (This field has a limit of 240 characters.)
Opportunities	Potential business opportunities associated with this plan. (This field has a limit of 240 characters.)
Threats	Potential threats that might limit business opportunities associated with this plan. (This field has a limit of 240 characters.)
NOTE: The following fields are available with Oracle CRM On Demand Partner Relationship Management Edition and might not be available for your configuration. If these fields are not available, contact your administrator.	
Owner Partner Account	The name of the Partner Account to which the owner of the business plan belongs.
Originating Partner Account	The name of the Partner Account that originated the business plan.
Principal Partner Account	The name of the Partner Account that is leading the effort on the business plan.

Related Topics

See the following topics for related information for business plans:

- Business Plans (on page 389)

- Working with the Business Plan Homepage (on page 390)

- Managing Business Plans (on page 392)

Objectives

Use the Objective pages to create, update, and track objectives for a business plan.

An *objective* is a tactical goal that you want to achieve, to attain a higher-level strategic goal in a business plan. Typically, you create an objective that is related to a business plan. While a business plan might establish an overall annual revenue goal for an account, an objective establishes a tactical goal, such as completing a number of sales calls, or attaining a certain number of new prescriptions at a medical practice. Objectives provide an intermediate level of planning, between setting high-level strategic goals with business plans, and low-level planning with activities (individual sales visits and calls) and opportunities (individual sales deals).

An objective does not have to be subsidiary to a business plan. Organisations can choose to use objectives differently. Like business plans, you can apply objectives to accounts, contacts, or products. A given objective can have multiple child objectives. You can set objectives for the short-term or long-term periods. The periods are based on company-defined planning periods, which are typically months, quarters, or years. Objectives are not as flexible as business plans. While a business plan can relate to multiple accounts and contacts, an objective can relate to only one account and one contact.   In addition, while an opportunity can relate to multiple business plans, an opportunity can relate to only one objective.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking objectives, then the Objective tab might be excluded from your setup.

Working with the Objective Homepage

The Objective Homepage is the starting point for managing objective records.

NOTE: Your company administrator can customise the layout of your Objective Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating an Objective

You can create a new objective by clicking the New button in the Recently Modified Objectives section. For more information, see Creating Records (on page 51) and Objective Fields (on page 399).

Working with Objective Lists

The Objective Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for objectives.

Objective List	Filters
All Objectives	All objectives to which you have visibility, regardless of who owns the objective.
Recently Modified Objectives	All objectives with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Objectives

The Recently Modified Objectives section shows the objectives that you modified most recently.

Click the Show Full List link to expand the list.

Adding Sections to Your Objective Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Objective Homepage:

■ Recently Created Objectives

■ Recently Modified Objectives

■ My Recently Created Objectives

■ My Recently Modified Objectives

■ Additional report sections (Your company administrator can make report sections available for display on your Objective Homepage.)

To add sections to your Objective Homepage

1 On the Objective Homepage, click Edit Layout.

2 On the Objective Homepage Layout page, click the directional arrows to add or remove sections, and to organise the sections on the page. Then click Save.

Managing Objectives

For step-by-step procedures for managing objectives, see:

■ Linking Records to Objectives (on page 398)

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

- [Working with Lists](#) (on page 112)
- [Using Assessment Scripts](#) (on page 156)
- [Sharing Records (Teams)](#) (on page 134)
- [Working with Attachments](#) (on page 147)
- [Viewing Audit Trails for Records](#) (on page 164)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

User Role and Access Profile Settings

To work with the Objective pages, you must have the following privileges in your user role:

- Manage Business Planning Access
- Manage Period Administration

In addition, your access profile settings must allow you to access the following record types:

- Business Plan
- Objective
- Plan Account
- Plan Contact
- Plan Opportunity

Related Topics

See the following topics for related information on objectives:

- [Objectives](#) (on page 395)
- [Working with the Objective Homepage](#) (on page 396)
- [Objective Fields](#) (on page 399)

Linking Records to Objectives

You can also link the following records to an objective by adding sections to the Detail Page for the objective record:

- Objectives
- Opportunities
- Activities

For more information, see Changing Your Detail Page Layout (on page 855).

To link records to an objective

1 On the Objective Detail page, click Edit Layout.

2 On the Objective Detail Layout page, click the arrows to add the section for the record, and to organise the sections on the page.

3 Click Save.

Objective Fields

Use the Objective Edit page to add an objective, or update details for an existing objective. The Objective Edit page shows the complete set of fields for an objective.

TIP: You can also edit objectives on the Objective List page and the Objective Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information about some of the objective fields.

Field	Description
Key Objective Information	
Objective Name	The name of the objective. (Required.)
Plan Name	The parent business plan associated with this objective. Select the business plan, using the Lookup icon.
Type	The general purpose of the objective. Examples are: Awareness, Education, Relationship, New account acquisition, Increase account penetration, Product trial, Special incentive, Account retention, and Competitive response. Select the type from the drop-down list. (Required.)
Status	The current status of the objective. Examples are: Draft, Submitted, Final Approved, Current, Expired, Future, and On Hold. Select the status from the drop-down list. (Required.)
Account Name	The account associated with this objective. Click the Lookup icon to select the account.
Contact Name	The contact associated with this objective. Click the Lookup icon to select the contact.
Product Name	The product associated with this objective. Click the Lookup icon to select the product.

Field	Description
Period	A period defines the time within which to complete an objective. A period objective is determined by your company's fiscal calendar definition, which your company administrator defines. (Required.) A period can correspond to a fiscal year, quarter, month, or week, for example, Fiscal Quarter 1, 2010. The available periods listed are based upon your company's defined fiscal calendar. For more information on defining fiscal calendars, see About Fiscal Calendars. **NOTE:** You require the Manage Period Administration privilege to select a period.
Period: Start Date	The starting date of a period. Click the Calendar icon to select the start date.
Period: End Date	The ending date of a period. Click the Calendar icon to select the end date.
Target Information	
Objective Revenue	The revenue target for this objective, for example 1,000,000.
Currency	The currency for the revenue (for example, USD or EURO). Click the currency icon to choose your required currency.
Exchange Date	The relevant date for converting local revenue into currencies that headquarters use.
Target Audience	The target group or organisation for this objective, for example, physician practices specialising in cardiology.
Objective Target	The goal or outcome for this objective, expressed in objective units, for example, 1000 to represent 1000 customer calls.
Objective Units	The unit of expression for the objective target, for example, Sales Units, Number of Calls, dollars ($), and so on. Click the drop-down list to select the objective unit.
Additional Information	
Description	The description of the objective.
Owner	The owner of the objective record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

Related Topics

See the following topics for related information about objectives:

- Objectives (on page 395)

- Working with the Objective Homepage (on page 396)

■ Managing Objectives (on page 397)

Plan Accounts

Use the Plan Account pages to create, update, and track plan accounts that are associated with business plans. A *plan account* maps accounts and business plans, in other words, you use plan accounts to associate accounts with business plans. A plan account allows an account to have multiple business plans (for example, one for a general sales force and one for a specialty sales force). However, a business plan covers multiple accounts (for example, all accounts in a territory).

It is possible that some users might not interact directly with the plan account record type. Instead, they associate accounts with business plans from the Business Plan Detail Page or from the Account Detail Page. Some users might prefer to work directly with the plan account record type.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking plan account information, the Plan Account tab might be excluded from your setup.

Working with the Plan Account Homepage

The Plan Account Homepage is the starting point for managing plan accounts.

NOTE: Your company administrator can customise the layout of your Plan Account Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Plan Account

You can create a new plan account by clicking the New button in the Recently Modified Plan Accounts section. For more information, see Creating Records (on page 51) and Plan Account Fields (on page 403).

Working with Plan Account Lists

The Plan Accounts Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for plan accounts.

Plan Account List	Filters
All Plan Accounts	All plan accounts to which you have visibility, regardless of who owns the plan account.
Recently Modified Plan Accounts	All plan accounts with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Plan Accounts

The Recently Modified Plan Accounts section shows the plan accounts you modified most recently.

Click Show Full List to expand the list.

Adding Sections to Your Plan Account Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Objective Homepage:

- Recently Created Plan Accounts

- Recently Modified Plan Accounts

- My Recently Created Plan Accounts

- My Recently Modified Plan Accounts

- Additional report sections (Your company administrator can make report sections available for display on your Plan Account Homepage.)

To add sections to your Plan Account Homepage

1 On the Plan Account Homepage, click Edit Layout.

2 On the Plan Account Homepage Layout page, click the directional arrows to add or remove sections, and to organise the sections on the page. Then click Save.

Managing Plan Accounts

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)

- Updating Record Details (on page 103)

- Linking Records to Your Selected Record (on page 104)

- Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

User Role and Access Profile Settings

To work with the Plan Account pages, you must have the following privileges in your user role:

- Manage Business Planning Access
- Manage Period Administration

In addition, your access profile settings must allow you to access the following record types:

- Business Plan
- Objective
- Plan Account
- Plan Contact
- Plan Opportunity

Related Information

See the following topics for related information about plan accounts:

- Plan Accounts (on page 401)
- Working with the Plan Account Homepage (on page 401)
- Plan Account Fields (on page 403)

Plan Account Fields

Use the Plan Account Edit page to add a plan account or update details for an existing plan account.

TIP: You can also edit plan accounts on the Plan Account List page and the Plan Account Detail page. For more information on updating records, see Updating Record Details.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the plan account fields.

Field	Description
Key Plan Account Information	
Account	The Oracle CRM On Demand account that is associated with this plan account record. Click the Lookup icon to select the associated account. (Required.) For more information on Account fields, see Account Fields (on page 286).

Field	Description
Primary Plan Account	Select this check box to indicate which account (if any) is the primary account associated with a plan.
Business Plan	The business plan that is associated with this plan account record. Click the Lookup icon to select the associated business plan. (Required.)
Account: Location	The location information from the Location field in the account record. It shows the type of facility operated by the account at this site, such as Headquarters. (View only.)
Account: Priority	The priority information from the Priority field in the account record. It shows the priority for the account, such as High, Medium, or Low. (View only.)
Account: Account Type	The account type information from the Account Type field in the account record. It shows the relationship of the account to your company, such as Prospect, Customer, Partner, or Competitor. (View only.)
Account: Reference	The reference information from the Reference check box in the account record. It indicates whether the account can be used as a reference for potential customers or sales representatives. (View only.)
Account: Owner	The owner information from the Owner field in the account record. It indicates the alias of the Account record owner. (View only.)

Related Information

See the following topics for related information about plan accounts:

- Plan Accounts (on page 401)

- Working with the Plan Account Homepage (on page 401)

- Managing Plan Accounts (on page 402)

Plan Contacts

Use the Plan Contact pages to create, update, and track contacts that are associated with business plans. A *plan contact* is a record that allows you to associate contacts with business plans, allowing each contact to have multiple business plans. For example, you can have one plan contact for a general sales force and one plan for a specialty sales force. At the same time, a plan contact allows a business plan to cover multiple contacts, for example, all the contacts in a territory.

Some users might not interact directly with the plan contact record type, but rather associate contacts with business plans from the Business Plan Detail page or from the Contact Detail page. Other users, however, might prefer to work directly with the plan contact record type.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking Plan Contact information, the Plan Contact tab might be excluded from your setup.

Working with the Plan Contact Homepage

The Plan Contact Homepage is the starting point for managing plan contacts.

NOTE: Your company administrator can customise the layout of your Plan Contact Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Plan Contact

You can create a new plan contact by clicking the New button in the Recently Modified Plan Contacts section. For more information, see Creating Records (on page 51) and Plan Contact Fields (on page 407).

Working with Plan Contact Lists

The Plan Contacts Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for plan contacts.

Plan Contact List	Filters
All Plan Contacts	All plan contacts to which you have visibility, regardless of who owns the plan account.
Recently Modified Plan Contacts	All plan contacts with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Plan Contacts

The Recently Modified Plan Contacts section shows the plan contacts that have been modified most recently. To expand the list, click Show Full List.

Adding Sections to Your Plan Contact Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Plan Contact Homepage:

■ Recently Created Plan Contacts

■ Recently Modified Plan Contacts

- My Recently Created Plan Contacts

- My Recently Modified Plan Contacts

- Additional report sections (Your company administrator can make report sections available for display on your Plan Contact Homepage.)

To add sections to your Plan Contact Homepage

1 On the Plan Contact Homepage, click Edit Layout.

2 On the Plan Contact Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page. Then click Save.

Managing Plan Contacts

For step-by-step procedures for managing plan contacts that are common to many record types, see:

- Creating Records (on page 51)

- Updating Record Details (on page 103)

- Linking Records to Your Selected Record (on page 104)

- Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

User Role and Access Profile Settings

To work with the Plan Contact pages, you must have the following privileges in your user role:

- Manage Business Planning Access

- Manage Period Administration

In addition, your access profile settings must allow you to access the following record types:

- Business Plan

- Objective

- Plan Account

- Plan Contact

- Plan Opportunity

Related Information

See the following topics for related information about plan contacts:

- Plan Contacts (on page 404)
- Working with the Plan Contact Homepage (on page 405)
- Plan Contact Fields (on page 407)

Plan Contact Fields

Use the Plan Contact Edit page to add a plan contact or update details for an existing plan contact. The Plan Contact Edit page shows the complete set of fields for a plan contact.

TIP: You can also edit plan contacts on the Plan Contact List page and the Plan Contact Detail page. For more information on updating records, see Updating Record Details.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the plan contact fields.

Field	Description
Key Plan Contact Information	
Contact	The Oracle CRM On Demand contact that is associated with this plan contact record. Click the Lookup icon to select the associated contact. (Required.) For more information on contact fields, see Contact Fields (on page 311).
Primary Plan Contact	Select this check box to designate whether the contact is the main contact for the business plan.
Contact: First Name	The information from the First Name field in the contact record. (View-only.)
Contact: Last Name	The information from the Last Name field in the contact record. (View-only.)
Contact: Account	The account associated with the contact. (View-only.)
Business Plan	The business plan that is associated with this plan contact record. Click the Lookup icon to select the associated business plan. (Required.)

Related Topics

See the following topics for related information for plan contacts:

- Plan Contacts (on page 404)
- Working with the Plan Contact Homepage (on page 405)
- Managing Plan Contacts (on page 406)

Plan Opportunities

Use the Plan Opportunity pages to create, update, and track opportunities associated with a business plan. A *plan opportunity* associates opportunities with business plans, allowing an opportunity to be associated with multiple business plans (for example, one for a general sales force and one for a specialty sales force). A business plan can relate to multiple opportunities at the same time.

Some users might not interact directly with the plan opportunity record type, but rather associate opportunities with business plans from the Business Plan Detail page or from the Opportunity Detail page. However, other users might prefer to work directly with the plan opportunity record type.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking Plan Opportunity information, the Plan Opportunity tab might be excluded from your setup.

Working with the Plan Opportunity Homepage

The Plan Opportunity Homepage is the starting point for managing plan opportunities.

NOTE: Your company administrator can customise the layout of your Plan Opportunity Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Plan Opportunity

You can create a plan opportunity by clicking the New button in the Recently Modified Plan Opportunities section. For more information, see Creating Records (on page 51) and Plan Opportunity Fields (on page 410).

Working with Plan Opportunity Lists

The Plan Opportunities Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for plan opportunities.

Plan Opportunity List	Filters
All Plan Opportunities	All plan opportunities to which you have visibility, regardless of who owns the plan opportunity.
Recently Modified Plan Opportunities	All plan opportunities with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Plan Opportunities

The Recently Modified Plan Opportunities section shows the plan opportunities that have been modified most recently. To expand the list, click Show Full List.

Adding Sections to Your Plan Opportunity Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Plan Opportunity Homepage:

- Recently Created Plan Opportunities

- Recently Modified Plan Opportunities

- My Recently Created Plan Opportunities

- My Recently Modified Plan Opportunities

- Additional report sections (Your company administrator can make report sections available for display on your Plan Opportunity Homepage.)

To add sections to your Plan Opportunity Homepage

1 On the Plan Opportunity Homepage, click Edit Layout.

2 On the Plan Opportunity Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page. Click Save.

Managing Plan Opportunities

For step-by-step procedures for managing plan opportunities that are common to many record types, see:

- Creating Records (on page 51)

- Updating Record Details (on page 103)

- Linking Records to Your Selected Record (on page 104)

- Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

User Role and Access Profile Settings

To work with the Plan Opportunity pages, you must have the following privileges in your user role:

■ Manage Business Planning Access

■ Manage Period Administration

In addition, your access profile settings must allow you to access the following record types:

■ Business Plan

■ Objective

■ Plan Account

■ Plan Contact

■ Plan Opportunity

Related Information

See the following topics for related, plan opportunity information:

■ Plan Opportunities (on page 408)

■ Working with the Plan Opportunity Homepage (on page 408)

■ Plan Opportunity Fields (on page 410)

Plan Opportunity Fields

Use the Plan Opportunity Edit page to add a plan opportunity or update details for an existing plan opportunity.

TIP: You can also edit plan opportunities on the Plan Opportunity List page and the Plan Opportunity Detail page. For more information on updating records, see Updating Record Details.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the plan opportunity fields.

Field	Description
Plan Opportunity Information	
Business Plan	The business plan that is associated with this plan opportunity record. Click the Lookup icon to select the business plan. (Required.)

Field	Description
	For more information on business plans see Business Plans (on page 389).
Opportunity	The opportunity in Oracle CRM On Demand that is associated with this plan opportunity record. Click the Lookup icon to select the associated opportunity. (Required.)
	For more information on opportunities, see Opportunities (on page 315).
Opportunity: Account	The account associated with opportunity. (View-only.)
Opportunity: Close Date	The expected close date associated with the opportunity. (View-only.)
Opportunity: Forecast	If this check box is selected, it indicates that the opportunity is to be included in the forecast revenue calculation. (View-only.)
Opportunity: Owner	The information from the Owner field in the opportunity record. The owner is the person who is assigned to this opportunity. (View-only.)
Opportunity: Revenue	The potential revenue associated with the opportunity. (View-only.)

Related Topics

See the following topics for related information about plan opportunities:

■ Plan Opportunities (on page 408)

■ Working with the Plan Opportunity Homepage (on page 408)

■ Managing Plan Opportunities (on page 409)

6 Service and Communications

Oracle CRM On Demand provides the following record types for information about customer services:

- **Service Requests.** Use these pages to manage service requests from customers for products or services.

- **Solutions.** Use these pages to store answers to common questions or service issues.

- **Communication.** Use these pages to manage customer interactions through your call centre (Oracle Contact On Demand).

Managing Service and Communications

To manage service and communications, perform the following processes:

1 Process of Creating a Service Request (on page 413).

2 Process of Working on a Service Request (on page 414).

3 Process of Resolving a Service Request (on page 414).

4 Process of Closing a Service Request (on page 414).

Service requests can result from either incoming calls from the customer or customer calls received through Oracle CRM On Demand.

Process of Creating a Service Request

To create a service request, perform the following tasks:

1 Verify the customer information and record the service issue.

2 Use service scripts to consistently apply company procedures, such as identifying problems and escalating issues.

    For more information about scripts, see Using Service Request Scripts (on page 419).

3   Assign service requests to service representatives, see Assigning Service Requests (on page 418).

Process of Working on a Service Request

To work on a service request, perform the following tasks:

1   Log the follow-up calls.

2   Log the tasks.

3   Log notes to record the actions taken to assist the customer.

For more information on adding activities to service requests, see Creating Activities (on page 189) and Activity Fields (on page 222).

Process of Resolving a Service Request

To resolve a service request, perform the following tasks:

1   Search the solutions library for information to help you to resolve the customer request, see Reviewing Solutions (on page 428).

2   Link the appropriate solutions to the service request and rate their usefulness, so that the library can be continuously monitored and improve, see Rating Solutions (on page 429).

3   Use prebuilt or custom reports to identify the issues, see Running Reports (on page 927).

4   Take immediate action to resolve them. If you cannot find a solution, add a new one to the library, see Managing Solutions (on page 427).

Process of Closing a Service Request

To close a service request, perform the following tasks:

1   Record the wrap-up activities.

2   Close the service request when it is resolved, see Closing Resolved Service Requests (on page 420).

Service Requests

Use the Service Request pages to record, track, and address customer requests for information or assistance. A *service request* holds all the relevant, detailed information about a particular service activity. You can also

use the service request to capture additional information, such as solutions or activities required to resolve the service request. Service representatives can access all the relevant information about service requests in one location. To ensure that a service request record captures all service activity, the changes to records are tracked through an audit trail. For information about dealing with service requests, see Managing Service and Communications (on page 413).

Working with the Service Request Homepage

The Service Request Homepage is the starting point for managing service requests.

NOTE: Your company administrator can customise the layout of your Service Request Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Service Request

You can create a service request record by clicking the New button in the My Open Service Requests section. For more information about service requests, see Assigning Service Requests (on page 418) and Service Request Fields (on page 421).

Working with Service Request Lists

The Service Request Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for service requests.

Service Request List	Filters
All Service Requests	none
All Closed Service Requests	Status = Closed
All Escalated Service Requests	Status = Open - Escalated
All Open Service Requests	Status=Open, Status = Open - Escalated
All Recently Created Service Requests	All service requests, sorted by the created date
All Recently Modified Service Requests	All service requests, sorted by the modified date
My Open Service Requests	Status = Open (displays records containing your user name in the Owner field)
My Service Requests	Service Requests with your name in the Owner field

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Open Service Requests

The My Open Service Requests section shows a list of your open service requests, in the order in which they were created. To expand the list, click the Show Full List link.

Viewing Service Request Related Tasks

The Service Request-Related Tasks section shows open service request-related tasks assigned to you, sorted by due date and then priority. It shows this information:

- **Due Date.** Date task is due as set by you or your manager.

- **Priority.** Priority for tasks as set by you or your manager, such as 1-High, 2-Medium, or 3-Low. The task priority is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority.

  NOTE: If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values.

- **Subject.** Title of task. Click the link to review the task.

- **Service Request.** Number the system assigns to identify the service request.

Click Show Full List to expand the list of service request-related tasks.

Viewing Open Service Request Reports

The Open Service Request Analysis section shows service request reports by source, product area, user name, or priority. You can click a chart section or table item to see the details and to determine what needs to be done to resolve issues today. You can also change the categories in the drop-down list to view the same data from another perspective.

For example, you can:

- Use this analysis to keep informed about open and escalated service requests.

- Filter by Product Area to see which areas are generating the most calls.

■ Filter by User Name to see how the workload is spread across the team.

■ Filter by Priority to see the level of service issues being reported.

To see other types of service analyses, go to the Reports Homepage.

Adding Sections to Your Service Request Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Service Request Homepage:

■ Service Request-Related Tasks

■ My Current Service Request Related Tasks (tasks that are due today)

■ Additional report sections (your company administrator can make report sections available for display on your Service Requests Homepage)

To add sections to your Service Request Homepage

1 On the Service Request Homepage, click the Edit Layout link.

2 On the Service Request Homepage Layout page, use the directional arrows to add or remove sections and to organise the sections on the page.

3 Click Save.

Managing Service Requests

To manage service requests, do the following tasks:

■ Assigning Service Requests (on page 418)

■ Using Service Request Scripts (on page 419)

■ Adding Solutions to Service Requests (on page 419)

■ Escalating Service Requests (on page 420)

■ Closing Resolved Service Requests (on page 420)

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

■ Viewing Audit Trails for Records (on page 164)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topic for related information:

- Working with Oracle Social Network (on page 467)

Assigning Service Requests

When you create a service request, the owner field is blank. You can either assign the owner manually or, if your company uses the assignment manager and the Service Request record type is configured for the user mode or mixed mode of record ownership, then the service request can be automatically assigned to an owner when the request is first saved. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

NOTE: The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. If there is a primary custom book assigned to the record before the assignment manager reassigns the record to an owner, then the assignment manager removes the primary book from the record. The assignment manager cannot reassign records if the record type is configured in book mode. If you configure a record type in book mode, then it is strongly recommended that you make all rule groups for that record type inactive.

If a service request has already been assigned and your access levels permit you to do so, then you can reassign the request by changing the owner name or the primary custom book on the request. In addition, if your company uses the assignment manager and the Service Request record type is configured for the user mode or mixed mode of record ownership, then you can reassign a service request to a new owner in one of the following ways:

- Select the Reassign Owner check box on the request.

- Delete the owner name or the primary custom book from the request.

Selecting the Reassign Owner check box or deleting the owner or primary custom book name triggers the assignment manager to process the service request again and assign it to an owner according to the rules set up by your company.

NOTE: If a service request has a status of Closed, then the assignment manager ignores the service request, and it is not reassigned. Also, the processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned, and current system load.

To manually assign a service request

1 Select the service request that you want to assign.

For instructions on finding service requests, see Finding Records (on page 68).

2 On the Service Request Detail page, click Edit.

3 On the Service Request Edit page, position your cursor in the Owner field or Book field, click the Lookup icon, and then select a new owner or book in the Lookup window.

4 Save your changes.

Using Service Request Scripts

Your company administrator might have set up the assessment scripts to help you to gather information about the service requests (Call Scripts), or to assess the customer satisfaction levels (Customer Satisfaction Surveys). An assessment script consists of a series of questions that you use to collect customer data. Your responses are scored, assigned a weight and compared with a specified threshold to determine the appropriate outcome or course of action.

Before you begin. To use assessment scripts, your user role must be set up to allow access to the assessment records. For more information about the required settings, see About Assessment Scripts.

To use a service request script

1 Select the service request.

For more information on selecting service requests, see Finding Records (on page 68).

2 On the Service Request Detail page, scroll down to the Call Scripts section or the Customer Satisfaction Surveys section and click Add.

NOTE: If the Call Scripts section or the Customer Satisfaction Surveys section is not shown, click the Edit Layout link in the upper-right corner of the page and add the appropriate section to your page layout. These sections are only available to add to your page if your company administrator has set them up.

3 In the Lookup window, search for the appropriate script, and click Select. You can use the filter fields at the top of the Lookup window to filter the list of scripts.

4 In the Call Scripts or Customer Satisfactions Survey window, select the answer for each script question and then click Save.

The Service Request Detail page appears again. Depending on the outcome of the script, some of the fields on the record might have been automatically updated.

Adding Solutions to Service Requests

You can add an existing solution to your service requests. For more information on solutions, see Solutions (on page 423).

To add a solution to a service request

1   Select the service request.

For more information on selecting service requests, see Finding Records (on page 68).

2   Scroll to the Solutions section of the Service Request Details page and click Add.

A list of solutions that are approved and published appears.

3   To limit the number of solutions that appear, use the filtering options to search on keywords or Solution ID.

4   Click Preview to view the solution details to make sure that it addresses your customer's concerns.

5   Click the Select link beside each solution that you want to add to your service request, and then click OK.

6   Change the status of the service request to Pending until you can confirm with your customer that the problem is resolved, as follows:

a   On the Service Request Details page, click in the Status field, and select the Pending status from the drop-down list.

b   Click the green check mark icon in the Status field to save the change.

Escalating Service Requests

You can escalate a service request so that it stands out as an urgent matter.

To escalate a service request

1   On the Service Request List page, click in the Status field of the Service Request you want to escalate.

2   Select Open-Escalated from the drop-down list in the field.

3   Click the green check mark icon in the Status field to save the change.

Your company policy determines what actions are taken when a service request is escalated. For example, your company administrator might define a workflow rule that sends an email or generates a task when a service request is escalated.

You can create a filtered list to show all escalated service requests to which you have access.

Closing Resolved Service Requests

After you have satisfactorily answered your customer's request, you can close the service request.

Before you begin: View the Service Request detail page to make sure that the service request is complete by verifying the following:

■ All activities on the service request have a Completed status, indicating that you have followed up with your customer.

■ If your company uses solutions, the solution is linked to the service request record, indicating how the problem was solved.

To close a resolved service request

1 On the Service Request List page, click in the Status field of the Service Request you want to close.

2 Select Closed from the drop-down list in the field.

3 Click the green check mark icon in the Status field to save the change.

Service Request Fields

Use the Service Request Edit page to add a service request or update details for an existing service request.

TIP: You can also edit service requests on the Service Request List page and the Service Request Detail page. For more information on updating records, see Updating Record Details (on page 103).

The Service Request Edit page shows the complete set of fields for a service request, as shown in the following table.

NOTE: Company administrators can customise your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information that you see on-screen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Contact Information	
SR Number	Service request ID. System-generated.
Account	Account linked to the service request.
Contact	Contact linked to the service request.
Work Phone #	Work phone number of the contact. Inherited from the Contact record.
Email	Email address of contact. Inherited from the Contact record.
Address	Address of contact or account for whom the service request is performed. You can select this address from a list of addresses associated with the account or the contact that is related to the service request record.
Service Detail Information	

Field	Description
Area	Category of service request, such as Product, Installation, Maintenance, Training, Other.
Cause	Reason for service request, such as Unclear Instructions, User Needs Training, Existing Issue, New Issue, Other
Type	Type of service request, such as Question, Issue, Enhancement Request, Other.
Source	Method by which service request is received, such as Phone, Web, Email, Fax.
Priority	Indication of priority, such as 1-ASAP, 2-High, 3-Medium, 4-Low.
Status	Status of service request, such as Open, Pending, Closed, Open-Escalated, Cancelled. Some filtered lists and reports use the Status field to determine which service requests should be included.
Opened Time	Date and time that you created the service request. System-generated.
Closed Time	Date and time status of service request changes to Closed. System-generated.
Owner	The alias of the owner of the service request record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. The value in the Owner field affects which records are included in reports that you or your managers run from Reports and Dashboard pages. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Reassign Owner	Indicates that the service request should be reassigned. If your company administrator has set up service request assignment rules, selecting this field triggers the assignment manager in Oracle CRM On Demand to process the service request again and assign it according to the rules. The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. The assignment manager cannot reassign records if the record type is configured in book mode. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47). **NOTE:** When you select this check box, the name in the Owner field changes when you save the record. However, depending on the complexity of your company's assignment rules, the number of records to be reassigned and the current system load, it may take some time for the tasks that are automatically performed to be completed, for example, sending the notification email.

Field	Description
Additional Information	
Subject	Summary of service request.
Description	Additional information about the service request. Limit of 16,350 characters.
Vehicle	The Vehicle ID Number (VIN) if a vehicle is associated with the service request.

Oracle Social Engagement and Monitoring Fields

If you are using Oracle Social Engagement and Monitoring, your administrator may add some or all of the following fields to the Service Request page. For more information, see .

Field	Description
Social Media	The ID for the social media record for an issue.
Social Media: Author Link	The URL to the profile of the author on the social media site.
Social Media:Community	The name, such as Facebook or Twitter, of the social media site where the message was posted.
Social Media:Influence Score	The influence score as sent by the partner.
Social Media:Post Data	The social media post data.
Social Media:Post Link	The URL to the social media post.
Social Media:Publish Date	The date the message was posted.
Social Media:Sentiment Score	The sentiment score as sent by the partner.
Social Media:Topic	The name of the post's topic as extracted from the post.

Solutions

Use the Solution pages to create, update, and track solutions. *Solutions* contain information about how to resolve a customer problem.   By maintaining a knowledge base of solutions, your service representatives

have access to a centralised knowledge base to help them resolve customer problems. In addition, the knowledge base expands as users interact with customers and create new solutions.

Oracle CRM On Demand tracks the usage of solutions and enables users to rate solutions. This information helps organisations to improve the solutions that they provide to customers and to identify problems in products or services. Frequently used solutions might indicate a product defect. Poor solution ratings might indicate the need to improve solutions.

About Managing Solutions

Consider implementing a process similar to the following to build and manage a knowledge base of solutions:

1 A company administrator imports your existing solutions into the application (optional).

2 Service agents and other experts add draft solutions to expand the breadth and depth of your knowledge base over time.

3 Service managers review, approve and publish solutions.

4 Agents score existing solutions to make sure the most helpful solutions rise to the top.

5 Service managers monitor the solutions knowledge base to ensure that only valid and current information is represented.

Best Practice Tips for Managing Your Solutions Knowledge Base

Having a well-organised and peer-evaluated library of solutions helps you consistently serve your customers more effectively. Here are some best practice tips for setting up and managing your solutions knowledge base.

1 - Import Your Existing Solutions

Before you import solutions, compare the information in your existing solutions with the Solution record in Oracle CRM On Demand. You might want to add, rename or remove fields from the record to match the information that you want to import.

You can use the Custom Field Setup Template, available in the Tools and Templates page in the Training & Support Centre, to help you plan changes. This document will help you plan for and keep track of any custom changes that you want to make to the application.

2 – Add Draft Solutions

Establish guidelines for creating solution records and communicate these to anyone who might create draft solutions, such as service agents, product or service experts. Be sure to emphasise the importance of the Title field in a solution record. This is a searchable field which appears on most lists and Lookup windows for solutions. Therefore, service agents will use it to quickly identify appropriate solutions to their questions or problems.

When a new solution record is created, it has a status of Draft. Draft solutions are not available to be added to service request records and will not appear in the solution Lookup window until they are published. So, if an

agent creates a Service Request and enters a draft solution during the call, the agent can add the draft solution to the Service Request, but the draft solution will not be accessible to other agents until it is published.

3 - Review, Approve and Publish Solutions

The approval process ensures that your identified experts get a chance to review all solutions before releasing them for general use by your service agents. Establish review and approval guidelines to ensure that all solutions are valid, easy to follow and consistently useful to those who need them.

You must have a role with the Publish Solutions privilege to change a solution status to Approved and to publish the solution. For more information, see Approving and Publishing Solutions (on page 429).

4 – Rate Solutions

Ask your service agents to rate the solutions that they use and add to their service request records. They can do this easily from the Solution Detail page by clicking the Rate Solution button. Solutions are rated on a scale of 1 5 . If the solution was highly effective, rate it a 5. If it was not effective or valid, rate it a 1.

Every time a solution is rated, its rating score is recalculated and displayed on the record. Having your agents rate the solutions gives you information that you can use to monitor the quality of your knowledge base. For more information, see Rating Solutions (on page 429).

5 – Monitor Solutions

Make sure that you regularly monitor your solutions knowledge base so that your service agents have the best and most current information and instructions. Some recommendations are:

- Assign an owner for certain areas or types of solutions and have each owner regularly review and update those solutions. Make each owner responsible for the accuracy and approval of his or her area.

- Over time, your solutions can become obsolete. Solutions related to products that are no longer supported are just one example. Create a Solution list to locate these solutions, filtering by the Product field, for example. Then, use the Mass Update feature to remove them from the searchable solutions.

- Do not delete a solution, unless it is a duplicate. Instead, set the status to Obsolete. Obsolete solutions no longer appear on the list when searching for a solution to add to a service request. However, you can still use the lists on the Solutions Homepage to access them if you need them.

- Review all solutions that are rated low. To find them, create a custom list that shows you all published solutions rated a 1 or 2.

- Use the prebuilt Solution lists on the Solutions Homepage to review your top-rated solutions and most active solutions. By doing so, you have an indication of any areas where you can potentially add more knowledge and expand your library.

- Routinely analyse your closed service requests for trends, and identify key problem areas where additional information should be added to your knowledge base.

Working with the Solution Homepage

The Solution Homepage is the starting point for managing solutions.

NOTE: Your company administrator can customise the layout of your Solution Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Solution Record

You can create a solution record by clicking the New button in the My Recently Viewed Solutions section. For more information, see Creating Records (on page 51) and Solution Fields (on page 430).

Working with the Solution Lists

The Solution Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for Solutions.

Solution List	Filters
Approved Solutions	Status = Approved
Published Solutions	Published = Y
Recently Created Solutions	All solutions, sorted by the created date
Recently Modified Solutions	All solutions, sorted by the modified date
Draft Solutions (visible only to users with the Publish Solutions privilege)	Status = Draft
Highest Rated Solutions	Highest cumulative ratings given by all individuals
Most Active Solutions	Frequently linked with Service Requests
All Solutions	All solutions, sorted alphabetically on Solution Title
My Recently Modified Solutions	All solutions you own, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Viewed Solutions

The My Recently Viewed Solutions section shows the solutions that you viewed most recently.

Viewing Most Active Solutions

The Most Active Solutions section shows the solutions that have been frequently linked with service requests. High usage can indicate to a service organisation the specific areas where customers are being challenged by product and services. Organisations can respond by providing more information to service representatives to help customers or by providing more information to customers directly.

Viewing Highest Rated Solutions

The Highest Rated Solutions section lists the solutions with the highest cumulative ratings given by all individuals.

Adding Sections to Your Solution Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Solution Homepage:

- Recently Created Solutions

- Recently Modified Solutions

- My Recently Created Solutions

- My Recently Modified Solutions

- One or more report sections (Your company administrator can make reports available on your Solution Homepage.)

The following procedure describes how to add sections to your Solution Homepage.

To add sections to your Solution Homepage

1 On the Solution Homepage, click Edit Layout.

2 On the Solution Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Managing Solutions

To manage solutions, perform the following processes:

- Reviewing Solutions (on page 428)

- Approving and Publishing Solutions (on page 429)

■ Rating Solutions (on page 429)

■ Adding Books to a Solution (on page 430)

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

■ Attaching Files and URLs to Records (on page 150)

■ Viewing Audit Trails for Records (on page 164)

NOTE: To update solution records, your user role must include the Publish Solutions privilege.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

■ Solution Fields (on page 430)

■ Reports (on page 907)

■ Importing Your Data

Reviewing Solutions

You can review the most active solutions or the highest rated solutions. You can also review the complete information for any solution record.

To review the most active solutions

1 From any page, click the Solutions tab.

2 In the Most Active Solutions section, click the Solution Title link for the solution you want to review.

To review the highest rated solutions

1 From any page, click the Solutions tab.

2 In the Highest Rated Solutions section, click the Solution Title link for the solution you want to review.

To review solution information

1   Select the solution.

    For instructions on selecting solutions, see Finding Records (on page 68).

2   On the Solution Detail page, you can review the solution record.

    For a description of fields, see Solution Fields (on page 430).

Approving and Publishing Solutions

Before you begin. To perform this procedure, your user role must include the Publish Solutions privilege.

You can review solutions for accuracy and completeness. Then you can approve the draft and publish it internally. Publishing a solution internally makes it available for all customer service representatives to use and link to service requests.

To approve and publish a solution

1   From the Solutions Homepage, click the Draft Solutions link.

2   From the Solutions List page, select the solution and then click Edit.

3   On the Solution Edit page, change the Status to Approved to approve the solution.

4   To publish the solution, select the Published check box.

5   Save the record.

Rating Solutions

You can rate the effectiveness of a solution as many times as you want to.

To rate solution information

1   Select the solution.

    For instructions on selecting solution, see Finding Records (on page 68).

2   In the Solution Details title bar, click the Rate Solution button.

3   On the Solution Rating page, select a rating from 1 to 5 (5 is the best) from the drop-down list.

4   Save the record.

    Individual user ratings are averaged to determine which solutions appear in the Highest Rated Solutions section on the Solutions Homepage.

Adding Books to a Solution

Use the following procedure to add books to a solution. When you add a book to a solution, you can modify or remove the book. This procedure assumes that the Books record type is displayed as a related item on the Solution page. For more information about customising related item information, see Customising Related Item Layouts.

To add a book to a solution

1   On the Solution List page, open the solution that you want.

2   On the Solution Detail page, click Add in the Books section of the page.

3   In the Book selector, choose the book that you want to add to the solution, and then click OK.

For more information about books, see Book Management.

Solution Fields

Use the Solution Edit page to add a solution or update details for an existing solution. The Solution Edit page shows the complete set of fields for a solution.

NOTE: Company administrators can customise your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information that you see on-screen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Solution Detail Information	
Solution ID	Unique ID of the solution. System-generated.
Title	Solution title. This field has a limit of 100 characters and is required.
Status	Solution's status, such as Draft, Approved, or Obsolete. Defaults to Draft. Only users with the Publish Solutions privilege can change this information.
Published	Indication that the solution is available for internal use. Only users with the Publish Solutions privilege can change this information.
Solution Rating	Rating of the solution from 1 to 5 (5 is the best).
Additional Information	
NOTE: The following fields are available with Oracle CRM On Demand Life Sciences Edition and might not be available for your configuration. If these fields are not available, contact your company	

Field	Description
administrator.	
Legal Approval	Indicates that the solution has received legal approval.
Marketing Approval	Indicates that the solution has received marketing approval.
Multi-file asset	Indicates that the solution consists of multiple digital files. A given solution image might consist of separate files for photos, logos, and other components of a larger image.
Expiration Date	The date after which this content must not be used in Personalised Content Delivery (PCD). Use the calendar icon to select the expiration date.
Release Date	The date after which this content can be used in PCD. Use the calendar icon to select the release date.
Verification Status	Indicates whether the solution can be displayed correctly. When users load multimedia or graphic files, they test them to make sure that they are displayed correctly, and they set the verification status to Successful. The values are: Not Verified, Successful, or Failed.
PCD Attachment Type	Indicates the type of the attached multimedia or graphic file: ■ **Message.** The content is suitable for a presentation. ■ **Thumbnail.** The content is a smaller, compressed version of a larger message record.
Related Thumbnail Image	The name of another solution record that provides a small thumbnail version of the main message solution. Each solution of the type Message must have a matching solution of the type Thumbnail.
Distribution Method	Select Publish to distribute the content automatically to remote users. The distribution is based on users' permissions.
NOTE: The following fields are available by default for all editions of Oracle CRM On Demand.	
FAQ	Frequently asked questions about the solution.
Solution Details	Additional information about the solution.

Communications

Use the Communication pages together with the Communication Tools and Voice Controls sections in the Action bar to manage customer interactions - phone calls, voicemail messages and emails. Supervisors can also monitor agents using these same areas of the application.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include using Oracle Contact On Demand, then the Communications tab and its subtabs might be excluded from your setup.

About Oracle Contact On Demand

Oracle Contact On Demand allows you to use voice, voicemail, and email to manage customer interactions. Because of its integration with Oracle CRM On Demand, each customer interaction is tracked and stored in the same location that your company uses to manage its contacts, accounts, solutions, and so on. This integration allows you to leverage the information in your company's database to find solutions to customer issues, update contact information, and run analytics against your data.

Oracle Contact On Demand is a Web-based call centre that uses these channels:

- **Voice**

  Oracle Contact On Demand allows you to establish real-time voice communication and uses skills based routing to forward calls to the appropriate agent. The call controls built into the interface allow you to receive calls, place outbound (external) calls and internal (agent-to-agent) calls, place a call on hold, hang up (close) a call, transfer a call, and conference in other parties. The feature includes these capabilities:

  - **Inbound calls.** Receive and work with an inbound call through the Oracle Contact On Demand interface anywhere there is a telephone, provided you are logged in to Oracle Contact On Demand.

  - **Outbound calls.** Oracle Contact On Demand supports outbound dialling to U.S. (domestic) and international locations. Calls can be placed from the Oracle Contact On Demand toolbar.

  - **Call Control.** All calls are handled through the Communication Tools and Voice Controls sections in the Action bar, and the Calls subtab on the Communications Homepage. Other information passed with the call (for example caller name, telephone number and 800 destination) is only displayed if configured.

  - **Internal calls.** Contact another agent or supervisor logged into Oracle Contact On Demand by selecting the desired agent or supervisor from a drop-down list of active users.

  - **Skills-based Routing.** Voice calls are routed to the agent most qualified to handle the call (that is, defined by customer touch-tone selection through IVR).

  - **Statistics Window.** Provides real-time statistics on call progress in the Oracle Contact On Demand application. The window displays the current state, the time in the state, the number of calls in the queue, and the call that has been waiting in the queue the longest.

  - **Click-to-Dial.** Outbound calls are placed by clicking the phone number link in the Details or List pages.

  - **Supervisor Control.** Supervisors can record and listen to previously recorded phone calls for quality assurance purposes. In addition, supervisors can monitor agents in real-time and invoke actions such as whisper, coach, join, take over and log agents out.

  - **Call-back.** Administrators can set up Oracle Contact On Demand so that if agents are busy, the caller can continue waiting for the next available agent. Alternatively, the caller can receive a call-back as soon as an agent is available. Oracle Contact On Demand allocates the call a place in the queue. When an agent is free to answer the call, the call centre server automatically calls the caller back with his or her contact phone number, and connects the caller to the available agent. The agent receives the incoming call.

  - **Web callback.** A Web callback is similar to a callback, except that the customer enters his or her phone number on a company's Web page, rather than using the phone. For example, a potential

customer visits a company's Web page, and the company Web page requests the customer to enter his or her phone number if the customer wants to receive a callback from an agent. An Oracle Contact On Demand administrator is responsible for administering this feature for customers. For more information on configuring the Web callback feature, see *Oracle Contact On Demand Administration Manager Guide.*

■ **Voicemail.** The voicemail channel for Oracle Contact On Demand uses skill-based routing to forward messages to the appropriate agent. Each Oracle Contact On Demand company defines when and how voicemail is offered to a caller. Applying the intelligent routing in Oracle Contact On Demand provides a rapid response to callers who choose to leave a voice message. This response has the same quality and priority as regular telephone calls. Agents can listen to the caller's message and reassign it to another agent or workgroup, if necessary. You can access the voicemail through the activity record, even after it is wrapped up. Voicemails can be played back on a local media player or on a phone.

■ **Email**

Emails are routed to an agent{\f2 '}s email, according to keywords in the email or the agent{\f2 '}s skills. Emails can be responded to, discarded and reassigned to another agent or workgroup. Agents are given limits on the number of emails they can work on at a time. To review these limits, the agent can click Statistics in the Action bar and review the Offline Messages line.

About IVR

Underlying the Voice and Voicemail channels is Interactive Voice Response (IVR). IVR uses underlying touch-tone recognition and Oracle Contact On Demand skill-based routing.

Touch-tone recognition permits the IVR to answer a call, play a pre-recorded message, and prompt the customers to indicate the nature of their query and route them to an appropriate agent (for example, by pressing 1 for Sales). If your company administrator has configured screen pops that are based on IVR prompts, the values entered by a caller with a touch-tone phone take precedence over the search criteria described under the heading, About Matching Records in Oracle Contact On Demand. IVR prompts support only the following: service request number, contact home phone number, and campaign ID.

Service request numbers in Oracle CRM On Demand contain a hyphen. However, when a caller enters a service request number in response to an IVR prompt, you must advise the caller to use an asterisk (*) to indicate the hyphen in the IVR prompt.

NOTE: Contact home phone number is not included in the standard Contact page layout.

About Matching Records in Oracle Contact On Demand

When an agent receives a communication from a customer, Oracle Contact On Demand does the following:

1 Searches existing records in the Oracle CRM On Demand database to try to find a match in Contact, Lead, Account, Service Request, and Campaign records.

For phone calls, the application looks for matches based on:

■ Originator phone number (which phone number the customer is dialling from). This information is captured in the Origin field. In a campaign, the originator phone number is the campaign phone number that the customer calls.

For emails, the application looks for matches based on:

■ Originator email address. This information is captured in the Origin field.

For campaign records to include phone numbers and email address fields, which are used to determine matches, your company administrator must customise the Campaign Detail page layout page in order to add the Campaign Email and Campaign Phone Number fields manually.

In Oracle Contact On Demand, service requests are associated with an activity only if an IVR prompt has been set up for that activity. For example, Oracle Contact On Demand searches for a matching contact home phone number only if the company administrator has configured an IVR prompt so that a caller is prompted to enter a home phone number. To match a contact home phone number, your company administrator must customise the standard Contact Detail page layout to include a contact home phone number field and must enter a valid contact home phone number in this field. For information on customising page layouts, see Customising Static Page Layouts.

2   When the search is complete, an activity record is created for the communication, which is linked to the matching record.

The following are the possible results of a search:

- If a unique service request is found, Oracle Contact On Demand associates the activity record with both the service request record and the service request's primary account.   Oracle Contact On Demand also associates the activity record with the service request's contact unless it finds a unique contact match for the phone number.

- If a unique contact match is found, Oracle Contact On Demand automatically associates the activity record with both the contact and the contact's primary account.

- If a unique lead match is found, Oracle Contact On Demand automatically associates the activity with both the lead and the lead's primary account.

- If a unique record match does not have an associated account, Oracle Contact On Demand automatically associates the unique account that matched the phone number, if a phone number exists.

- If a single match is found, the matching record appears.

- If multiple matches are found for a particular record type, Oracle Contact On Demand does not link the activity to a specific record for this record type.

NOTE: You must have access to a specific record type or else Oracle Contact On Demand cannot associate an activity with this record type.

NOTE: If an agent transfers a call to another agent, an activity will be created for the agent to whom the call is transferred.

Managing the Call Centre

As a supervisor, you need tools and information to help you operate your call centre effectively. You need to know how many calls, emails, and voicemails your team handles. You need to ask the following questions: what is the average handle time for each interaction: how long are customers waiting in the queue: and so on. Access to real-time information about your operations can help you to manage your call centre and even pinpoint improvement opportunities for individual agents.

Oracle Contact On Demand Supervisor Tools

Oracle CRM On Demand and Oracle Contact On Demand have several tools to help you manage your call centre. Every customer communication can be tracked and linked to customer records. This tracking feature builds a database of information about your operations and your customers, which you can access using reports and analyses. Agent-monitoring tools can also help you to coach individual agent performance.

Communications Dashboard

The Communications Dashboard shows real-time statistics about your call centre queues to help you analyse performance.

- Click the Dashboard tab and select the Communications dashboard from the drop-down list. Click Show.

- View the current number of customer interactions in each of your communication channels.

- Review individual workgroup statistics to help you analyse your call centre volumes and manage your workforce.

- Click the Additional Reports link to select a different dashboard to view other service or sales analyses.

Communications Reports and Analyses

The Reports Homepage contains links to prebuilt and custom-built analyses that can help you manage your call centre. Review custom and prebuilt analyses regularly to identify call centre trends, potential risks, and opportunities for improvement.

You can use Oracle CRM On Demand Answers to design customised reports to analyse the communications activities generated by your call centre interactions.   When you create a custom analysis:

- Use the Activities reporting subject area to build a communications-specific analysis.

- Expand the Activity folder, and then the Communication folder.

- Click the Oracle Contact On Demand data column names to add them to your custom analysis.

For further information, see Reports (on page 907).

Working with the Communication Homepage

The Communication Homepage is the starting point for managing customer interaction.

Viewing Customer Interactions

The Inbox section lists all customer interactions currently assigned to you for the channel you have chosen in the sub tabs (Calls, Voicemail or Email). For a description of the fields (columns), see Wrapping Up Communication Activities (on page 449). You can determine the period during which the Communication Homepage Inbox displays the current and completed activities in your personal profile. For more information, see Updating Your Personal Details (on page 836).

Working with Communications Lists

The Communications Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for communications:

This Activities List	Displays
All Aging Emails	All emails you can see that have been open longer than 24 hours.
All Aging Voicemails	All voicemails you can see that have been open longer than 24 hours.
All Callbacks	All Web call-backs and call-backs you can see.
All Emails	All emails you can see.
All Inbound Calls	All inbound calls you can see.
All Inbound Emails	All inbound emails you can see.
All Outbound Calls	All outbound calls you can see.
All Outbound Emails	All outbound emails you can see.
All Transfers	All transfers you can see.
All Voice Calls	All phone calls.
All Voicemails	All voicemails.
All Web Callbacks	All Web call-backs you can see.
My Communications Inbox	All customer interactions currently assigned to you. No new, incomplete emails appear in this list.
My Calls Inbox	Incomplete calls assigned to you.
My Voicemails Inbox	Incomplete Voicemails assigned to you.
Recently Completed Communications	All communications you have recently completed.
Recently Completed Calls	Calls you have recently completed.
Recently Completed Emails	Emails for which you have sent a reply.
Recently Completed Voicemails	Voicemails you have recently completed.

To view a list, click the list name.

To create a new list, click New List. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Completed Communications

The Recently Completed Communications section lists your most recently completed interactions. For a description of the fields (columns), see Wrapping Up Communication Activities (on page 449).

To expand the list of most recently completed communications, click Show Full List. This list displays a full page of records, which you can scroll through page by page.

Related Topics

See the following topics for related information:

- About Oracle Contact On Demand (on page 432)
- Managing Oracle Contact On Demand (on page 437)

Managing Oracle Contact On Demand

To manage Oracle Contact On Demand, perform the following tasks:

- Preparing for Interacting with Customers (on page 438)
- Handling Phone Calls (on page 440)
- Disabling the Communications Toolbar in a Browser Session (on page 443)
- Placing Calls (on page 444)
- Handling Call-backs (Web and Phone) (on page 445)
- Handling Voicemail Messages (on page 445)
- Handling Emails (on page 447)
- Wrapping Up Communication Activities (on page 449)
- Reviewing Your Statistics (on page 451)
- Viewing Interaction Histories (on page 452)
- Monitoring Agents (on page 453)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Preparing for Interacting with Customers

The following topics contain step-by-step procedures used in preparing to interact with customers.

Accessing Oracle Contact On Demand

When you sign in to Oracle CRM On Demand, the Communications tab should appear along with Accounts, Contacts, and so on. If it does not appear, do the following:

■ Click the arrow to the right of the row of tabs, and select Communications from the drop-down list.

   NOTE: If Communications does not appear as an option, you might have to add the tab to your layout or contact your company administrator. For instructions on displaying tabs, see Displaying Your Tabs (on page 854).

Updating Your Phone Number

When you want to receive phone calls at another location, be sure to update your phone number. The phone number that you enter is the one where the application directs your phone calls.

To update your phone number

1 In the Communication Tools section in the Action bar, click User Preference.

2 In the Configuration window, update the Phone Settings:

   ■ **SIP Address.** Protocol standard for receiving VoIP phone calls. Update this field if your company uses SIP-based VoIP.

   ■ **Outside Phone (Remote Extension).** Phone number where Oracle Contact On Demand routes your incoming calls. You can update this phone number at any time.

   ■ **Play Announcement.** Prompts you to press a digit (DTMF key) before the call is routed to you.

   TIP: If you work from home, you might want to select this option. This option prevents other people, such as children, from accidentally picking up a phone call routed from the call centre.

3 Click OK to close the Configuration window.

   The new settings take effect immediately.

Setting User Preferences

To change your personal greeting, work off hook, and change other phone-handling behaviour, you need to update your user settings.

To set your user preferences

1 In the Communication Tools section in the Action bar, click User Preference.

2 In the Configuration window, select the General Phone and Voicemail Prompt settings you want:

Setting	Description
General Phone	
Incoming Call Screen Pop	Automatically opens the Service Request, Campaign, Contact, Lead, Account, or Call Detail page when you answer a phone call. The application searches the Oracle CRM On Demand database for existing records that match the caller's phone number. If one match is found, the matching record appears (Service Request, Contact, Lead, or Account record). The Call Detail page appears in other cases, for example, if there is no match, or if there are multiple matches. For more information on matching records in Oracle CRM On Demand, see About Oracle Contact On Demand (on page 432).
Work Off Hook (Disable Dial Tone)	Keeps your line open after the first call is taken so that you do not have to pick up your phone to answer it. Instead, you can use the Voice Controls section in the Action bar to answer the phone.
Automatic Call Acceptance	(Available only when working off hook) Automatically accepts the inbound call so callers are connected without you taking any additional steps. A beep alerts the agent to indicate there is a caller on the line.
Phone Settings	For information on the Phone Settings options, see "Updating Your Phone Number", above.
Voicemail Prompt	
Agent Name Prompt Wav File	Recording that states your name.
Voicemail Greeting prompt Wav File	Recording that plays when a call is routed to your voicemail.
Welcome Prompt Wav File	Recording that plays when a customer is routed to your phone number.
Record a personalised prompt	Records your personal message. This prompt is used to automatically greet callers when the Play Greeting feature is activated by your Administrator.

Checking Your Oracle Contact On Demand Inbox

Inbox (on the Communication tab) section lists the channel-specific interactions still in progress that have been assigned to you within the chosen sub tab (Calls, Voicemail or Email). Oracle Contact On Demand considers these communications active until the following occurs:

- **Phone calls.** They are wrapped up when the call is terminated. The wrap up form automatically displays the status to Completed. To apply the Completed status to the activity, click Save in the wrap up screen. To leave the activity in the In Progress state, click Cancel. When the call is wrapped up, it is no longer displayed in the Inbox.

- **Voicemails.** You must manually select Wrap Up after you listen to a voicemail. The wrap up form automatically displays the status as Completed. When the voicemail is wrapped up, it is no longer displayed in the Inbox.

- **Emails.** You can reply, reassign, or discard email (junk mail, for example). When you reply to an email, a Wrap Up window automatically is displayed. This window allows the agent to include additional information in the Completed Email Activity.

  After the email is reassigned, or after the system automatically reassigns an email because an agent did not respond quickly enough, the email no longer appears in the agent's Inbox.

  NOTE: Email activities are not saved in Oracle CRM On Demand until they are replied to and wrapped up with a status of Completed. Your company administrator can also configure Oracle Contact On Demand to automatically wrap up an activity without a Wrap Up window displaying in Oracle Contact On Demand. For more information, see Wrapping Up Communication Activities (on page 449).

Making Yourself Available

For you to receive new call and voicemail interactions, your status must be Available. You can receive email interactions when your status is Available.   Depending on how your administrator has set up your status, it might change to Available as soon as you sign in to the application. If not, you need to manually set your status to Available.

When your status is Available, you can:

- Receive one or many types of new customer communications assigned to you (phone calls, emails, voicemails). The type and number of communications depends on the settings your administrator configured.

- See data pertaining to the inbound interactions displayed in the Action bar.

To make yourself available for phone calls

- In the Communication Tools section in the Action bar, click Unavailable.

  The Unavailable status changes to Available.

Handling Phone Calls

When you become available for work, you can start taking phone calls from customers. Depending on your company{\f2 '}s routing, you will receive calls based on your skill set, workgroup or other criteria.

You can determine the period during which the Communication Homepage Inbox displays the current and completed calls in your personal profile. For more information, see Updating Your Personal Details (on page 836).

In addition, the application searches for matching records for the phone call and displays the matching record. If no existing records—or multiple records—match the incoming phone call, the Call Detail window appears. For more information on this sequence, see About Oracle Contact On Demand (on page 432).

If you change your status to Unavailable, you can still be assigned emails. No other communications such as phone calls, voicemails can be assigned to you. You can make yourself unavailable while you do other work, such as completing or cleaning up existing messages. Making yourself unavailable prevents you from missing calls unnecessarily, for example, while you are doing other tasks. An alternative solution that prevents you from missing incoming calls is to run two browser sessions with the same user credentials: one with the Communications toolbar open, and the second with the Communications toolbar closed. Use the first browser for incoming calls, and the second browser for all other activities.

To take a phone call

■ When a new communication is assigned to you, answer the phone.

If Oracle Contact On Demand is configured to display screen pops, it displays the matching record based on a search for the following data (in this specific order):

- ■ Service Request
- ■ Campaign
- ■ Contact
- ■ Lead
- ■ Account

NOTE: Additional configuration tasks for Oracle Contact On Demand must be completed if you want the application to search for data entered by the caller in response to an Interactive Voice Response (IVR) prompt; that is, a service request number, contact home phone number, or campaign ID.

If you are not configured for screen pops, you can click the blinking Inbound Call alert in the Communication Toolbar to navigate directly to the Call Detail page.

When you accept the call, the call controls become active.

TIP: If a screen pop for an incoming call displays while you are editing a record, any unsaved data for this record is lost. A good practise is to run two browser sessions with the same user credentials: one with the Communications toolbar open, and the second with the Communications toolbar closed. Use the first browser for incoming calls, and the second browser for all other activities.

To hang up

■ Hang up the receiver, or click Hang-up in the Voice Controls section in the Action bar.

After the call ends, the Wrap Up form appears for you to track information about the call. Your Administrator may set a time-based wrap up, allowing you to complete work after the call. For more information on wrapping up activities, see Wrapping Up Communication Activities (on page 449).

To place a call on hold

■ In the Voice Controls section in the Action bar, click Hold at any point during the call.

Placing a call on hold allows you to park the call and pause voice communication with the caller. You can see the status of the call (that is, On Hold) in the Action bar.

To resume voice communication

■ Click the Hold button.

To transfer a call

1 In the Voice Controls section in the Action bar, click Transfer.

2 In the drop-down window, select the option you want.

3 In the Transfer window, perform one of the following, according to your previous selection:

For this option	Follow these steps
Agent	1. Select an agent.
	TIP: To find the agent in the list, use the Search for an Agent field.
	NOTE: A call transfer to an agent does not require the agent to be signed in to the application or available for calls.
	2. Click one of the following buttons:
	■ **Blind Transfer.** Transfers the call to another agent, disconnecting you from the call.
	■ **Announced Transfer.** Transfers the call, allowing you to announce the call to the agent who answers. The customer does not hear the announcement.
	■ **Conference.** Transfers the call, keeping you and the customer on the line while another person joins the call.
	TIP: You can double-click the agent name to transfer the call as a blind transfer.
	3. If the agent does not answer, you can click Abandon Transfer in the Voice Controls section at any time. This puts the customer on hold and returns the control to you. To reconnect with the caller, click the Hold button.
Group	Select the Skill Group from your company list of groups and click Transfer, or double-click the group name.
	A call transfer to a skill group does not require any agents to be signed in.
	TIP: To find the group in the list, use the Search for a Group field.

For this option	Follow these steps
Phone	4. Enter the telephone number in the available field. This might be a telephone within the company or outside of the company. 5. Click Conference, Announced Transfer or Blind Transfer to complete the transfer.
Voicemail	Sends the call to the agent&rsquo;s voicemail.

1 Enter information in the Wrap Up form.

NOTE: When you transfer a call, the call between you and the caller ends, prompting the Wrap Up form to appear.

To reconnect with the caller

■ Click the Abandon Transfer button and then click the Hold button.

NOTE: This option is available for announced transfers or conference transfers.

Disabling the Communications Toolbar in a Browser Session

If you are using multiple browser sessions in Oracle CRM On Demand to talk simultaneously to a customer and add details to a form, such as a Service Request, you can disable Communications Tools in one Oracle CRM On Demand browser session. This feature allows you to save the details that you are entering in the form. In the second Oracle CRM On Demand browser session, you can use Communications Tools to manage customer communications.

NOTE: The disabled Communication Tools section remains disabled in the browser session until you sign out, and then sign in again to Oracle CRM On Demand. It is not necessary to close the browser window.

To disable Communications Toolbar in browser session 1

1 From the Action bar, click the X button on the Communications Toolbar section title bar.

TIP: Move the pointer over the button to see a ToolTip that displays information about the button's functionality.

When the Disable Communications Toolbar button is clicked, a confirmation request appears.

2 Click OK to disable the Communications Toolbar.

NOTE: If you disable the Communications Toolbar, you cannot use the Discard, Wrap-up, Reassign and Open Email buttons, or Oracle Contact On Demand attachments, for example, viewing Interaction History from a Call Detail page, from the browser session. You can sign in again to Oracle CRM On Demand to enable the Communications Toolbar.

Placing Calls

From Oracle Contact On Demand, you can place external calls to customers or internal calls to another agent or supervisor.

By default, each agent has two separate phone lines, allowing you to receive an inbound call on one line and make an outbound call on the second line. For example, your customer might need information that you cannot supply. You can place the customer on hold, click the second line to begin using it, click Dial and call someone else for the information you need. When you receive the information, you can end the second call and return to your customer on the first line.

Placing an external call automatically creates an activity record within Oracle CRM On Demand for the call, unless you clear that option before dialling each call. Logging the outbound call activity saves you time tracking your daily activities, and allows managers to measure each agent{\f2 '}s productivity.

To place an external call

1   In the Communication Tools section in the Action bar, click Dial.

   NOTE: By default, the Log an Activity checkbox is selected.

2   You can then perform one of the following:

   ■   Select a number from the Recently Dialled list, and click Call.

      NOTE: These recently dialled numbers pertain to the current session. When you sign out, the list is cleared.

   ■   Enter the phone number, and click Call.

   ■   Click the Search Agents button, select the Agent from the list and click Dial.

      TIP: To find the agent in the list, use the Search for an Agent field.

3   Answer your phone.

   Oracle Contact On Demand then calls the destination phone number you entered.

To place an external call using Click-to-Dial

1   Navigate to a contact's details on a Contact Details or a Contacts List page.

   If the contact's number is displayed as a hyperlink, you can click on it to dial the number.

   NOTE: System Administrators can customise your system and change fields and their characteristics. Click-to-Dial may not work with such fields.

2   Click the phone link that you wish to dial.

    A Dialler dialog box appears.

   NOTE: The telephone number in this dialog box is read-only. To disable this dialog box, navigate to My Set-up, Personal Profile, and then My Profile, and deselect the Display Click-to-Dial Popup check box. You need to log out and login again for this change to take effect.

3 Click the Call button to place the outbound call.

Oracle Contact On Demand then calls the destination phone number you clicked.

To place an internal call

An internal call can be placed to any agent or supervisor. Their status is displayed in the list of users along with their name and target telephone number (that is, current location). A call placed to an agent rings that agent's telephone, regardless of whether or not the agent is logged in.

Handling Call-backs (Web and Phone)

Oracle Contact On Demand provides Web call-back and call-back capabilities, which must be set up by the administrator:

■ **Web Call-backs.** Customers access a form on the company Web site to schedule a call-back.

■ **Call-backs.** Customers request a call-back through the phone menu when they contact the call centre.

When a request for a call-back is submitted through either the Web page or phone menu, the call-back is routed to the best suited available agent. That agent sees a flashing alert, and the call buttons become activated.

To accept a call-back

■ Click Answer when you see the alert notification in your Action bar.

Accepting the call-back passes the call to you. Your phone rings, and when you answer it, the call is made to the requesting party. If you accept a Web call-back, the Web Call-Back dialog box displays information, which the caller entered in the Web call-back form.

NOTE: For Web call-backs, the Oracle Contact On Demand detail page is not displayed. However, the Activity records are automatically linked to any matching records.

Handling Voicemail Messages

Voicemail messages can be either personal or ACD messages. ACD messages are voicemails left for your company call centre. Those voicemail messages are routed according to the call flow set up by your administrator and are assigned to agents based on their skill and availability.

You can reassign a voicemail message to another agent, supervisor or skill group. When you reassign a voicemail, it goes through the routing again, according to the workflow your administrator set up. Reassigned voicemails are no longer owned by you.

When a voicemail message is in your queue, the Inbound Voicemail alert flashes in the Communication Tools section in the Action bar for a few seconds. The record also appears at the top of your Inbox on the Communications Homepage, within the Voicemail subtab.

You can determine for what timeframe the Communication Homepage Inbox displays current and completed voicemails in your personal profile. For more information, see Updating Your Personal Details (on page 836).

You can play a voicemail message at any time, and playing the message does not affect your availability to answer calls. However, your availability is affected if you choose to listen to the voicemail using the phone.

NOTE: Voicemail messages cannot be deleted.

To listen to a message (new or played)

1 In the Inbox, click the Subject link for the voicemail message.

2 On the Voicemail page, click the Listen to Vmail button.

This plays the voicemail through the local media player.

TIP: If you have problems listening to recorded messages, change the default media player on your machine.

To listen to a message on the phone (new or played)

1 In the Inbox, click the Subject link for the voicemail message.

2 On the Voicemail page, click the Listen to Vmail on Phone button.

The agent's phone rings and plays the voicemail through the phone.

To reassign the voicemail

1 On the Voicemail page, click Reassign.

2 Click Agent or Group in the window that appears.

3 In the Transfer window, select a group or agent.

If you click Agent, a dialog box opens with a list of all the agents and their respective statuses. The following list describes the statuses of the agents:

■ **Available.** The agent has the status of Available in the Communication Tools bar.

■ **On Break.** The agent has the status of Unavailable in the Communication Tools bar.

■ **Busy.** The agent is working on another interaction and is unavailable.

■ **Logout.** The agent is not logged in to the Communication Server. This information does not relate to the agent's status in Oracle CRM On Demand.

■ **ACD Email.** The agent is currently processing an email.

■ **Wrap Up.** The agent is currently processing a Wrap Up form.

4 Click Transfer.

Handling Emails

Emails are routed to agents based on skill, availability or keyword. When an email has been routed to you, the Incoming Email alert flashes in the Communication Tools section of the Action bar. The record also appears at the top of your Inbox on the Communications Homepage, within the Email subtab.

You can determine the period during which the Communication Homepage Inbox displays the current and completed emails in your personal profile. For more information, see Updating Your Personal Details.

Generally, you want to respond to all emails. However, when you receive email such as junk mail, which does not warrant a reply, you can discard it. Discarding wraps up the email without a response and no completed Email Activity is created. However, you can choose to create an email activity for discarded emails if you want. You can save incomplete email replies by clicking Save As Draft. These emails are saved to the Drafts folder. You cannot edit discarded and sent emails.

Your administrator also configures the settings for the maximum number of emails you can receive. You can see this information by looking at the Offline Messages line in the Statistics window, shown as x/y. x is the number of messages currently assigned to you. y is your allowed limit.

NOTE: When an agent receives an email, the agent's status remains at Available.

To read a new email

To access your new email, you can perform either of the following:

- Click the Incoming Email alert in the Communication Tools section in the Action bar.

  This automatically opens the Email subtab in the Communications Homepage.

- Navigate to the Email subtab on the Communications tab.

  This displays a list of new email assigned to you.

1 Click the Subject Link of the email that you want to review.

  The email content is displayed in the New Email Details window.

2 On the Email Details window, you can perform the following:

- **Reassign.** Resends the email to the same workgroup so that it can be reassigned to another agent or group.

  Enter information in the Note field if you want to provide background information for the next agent or group.

- **Discard.** Removes the email from the Inbox.

  Use this feature for unwanted emails. If you want to keep track of certain discarded emails, select the Log an Activity checkbox in the Discard Email dialog.

- **Save as Draft.** Saves the email in the draft email list within my Email section.

- **Reply.** On replying to an email, a wrap-up screen appears. Enter the appropriate wrap-up details and click Save.

The activity is now recorded in the Recently Completed Emails section of your Communication home page. Also, if the email was related to any records you can access the email from the record's

interaction history. Both the original email and the response are captured within the interaction history.

To read draft, sent and discarded emails

1   Click the Email subtab in the Communications Homepage.

2   In the My Emails section, locate the email that you want to review from the drop-down menu:

   ■   Draft Messages

   ■   Sent Messages

   ■   Discarded Messages

   This displays a list of emails for the selected folder.

3   Click the Subject link for the email that you want to review.

   The email content is displayed in the Email Details section.

   NOTE: The Outbound Email activity is saved as a separate activity record. If the Outbound Email activity is linked to a contact, account and so on, the activity record also appears in the contact or account's related information section. Oracle CRM On Demand creates only completed Email Activities in Sent Messages.

To reassign the email

1   On the Email page, click Reassign.

2   Click Agent or Group in the window that appears.

3   In the Transfer window, select a group or agent.

   If you click Agent, a dialog box opens with a list of all the agents and their respective statuses. The following list describes the statuses of the agents:

   ■   **Available.** The agent has the status of Available in the Communication Tools bar.

   ■   **On Break.** The agent has the status of Unavailable in the Communication Tools bar.

   ■   **Busy.** The agent is working on another interaction and is unavailable.

   ■   **Logout.** The agent is not logged in to the Communication Server. This information does not relate to the agent's status in Oracle CRM On Demand.

   ■   **ACD Email.** The agent is currently processing an email.

   ■   **Wrap Up.** The agent is currently processing a Wrap Up form.

4   Click Transfer.

Wrapping Up Communication Activities

Your administrator determines if the Wrap Up form in your Oracle Contact On Demand is enabled automatically or manually. By default, Wrap Up forms are obligatory, and only your administrator can enable or disable Wrap Up forms in Oracle Contact On Demand.

TIP: The Auto Wrap Up setting is available in the Company Profile section of Oracle CRM On Demand. Only administrators can enable or disable this setting. For more information on configuring the Auto Wrap Up settings, see *Oracle Contact On Demand Administration Manager Guide* and *Oracle Contact Centre Anywhere Administration Manager Guide.*

When you end any communication (calls, voicemails, emails), Oracle Contact On Demand automatically creates an activity and displays the Wrap Up form. You must complete the Wrap Up form to complete the communication activity.

If a Wrap Up form does not display, do the following:

- Check with your administrator that your Wrap Up form is enabled.
- Check if your browser has a pop-up blocker enabled.

CAUTION: Do not wrap up an activity while a call is still active, otherwise a second Wrap Up form is displayed when you hang up the phone. Do not leave multiple wrap up windows open, otherwise it is difficult to determine which Wrap Up form belongs to which call.

NOTE: Each individual activity opens one individual Wrap Up form. You can customise your Wrap Up forms in the Activity Application Customisation page in Oracle CRM On Demand. For more information on customising Wrap Up Layout forms, see Customising Static Page Layouts. For more information on assigning customised Wrap Up forms to specific users, see Adding Roles.

If the Wrap Up form is displayed while you are editing a record, the data already entered for this record is not lost, because the open page you are editing does not refresh when Oracle Contact On Demand saves the data on the Wrap Up form.

In the Wrap Up form, you can summarise what occurred during the communication. You can also link other records to the activity, such as accounts and contacts in the Wrap Up form. Linking records creates a historical audit of all communications between your company and a contact or account. You can also track all communications required to resolve a service request or all communications generated by a specific campaign, which helps your company to measure overall campaign effectiveness.

The following table describes some fields in the Wrap Up form.

Field	Description
Key Task Information	
Owner	Alias of the record owner. Generally, the owner can update the record, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access.
	This value affects which records are included in reports you or your managers run, as well as visibility in managed lists.
Subject	Default is the Activity Subtype followed by the phone number or email address.

Field	Description
Priority	Priority for this activity, as determined by your company setup. Read-only field.
Origin	Phone number or email address from which the call is made or the email address sent. Read-only field.
Destination	Phone number that the agent dials or target email address for the email. Read-only field.
Status	Defaults to Completed in the Wrap Up form. If you save the information with a status of Completed, the activity appears in the Recently Completed Communications section on your Communications Homepage.
Type	Activity type as defined at your company. Read-only.
Activity Subtype	Specific activity type. You cannot edit these values; only your company administrator can change or add values to the drop-down list. Default values are Inbound Call, Outbound Call, Inbound Transfer, Outbound Transfer, Missed Transfer, Inbound Email, Outbound Email, Forwarded Email, Reassigned Email, Email Response, Inbound Voicemail, Outbound Voicemail, Forwarded Voicemail, Reassigned Voicemail, Call-back, and Web Call-back.
Resolution Code	Short description of how this call is resolved. Default values are Bad Number, Busy, Call Back, Customer Update, Discarded Email, General Question, Literature Request, New Account, New Contact, New Lead, New Opportunity, New Service Request, No Answer, Not Interested, Outside Transfer, Other, Product Question, Reassigned to Agent, Reassigned to Group, Response Given, Scheduled Follow Up, Transferred to Agent, Transferred to Group, and Transferred to Voicemail. Your company administrator can change or add values to the drop-down list.
Related Items	Records linked to the activity. Oracle Contact On Demand automatically links records when the activity is created based on information captured by the application, such as origin, destination, and other caller entered digits. You can also create new records that are automatically linked to this activity or select existing ones to link. Click the Lookup icon next to the record type. On the Search page, select the existing record or click New, enter the required information on the Edit page, and save the record.
Additional Information	
Modified By	Name of the person who creates or updates the record followed by the date and time it occurs. System-generated.
Description	Additional information about the call. Limit of 16,350 characters.

Using automatic Wrap Up forms

You have one minute to complete the Wrap Up form, however, this time can be modified by an administrator. If you exceed the time limit allowed to enter the information in the Wrap Up form, a timer alert displays. Click OK and continue entering information, then Save. No further timer alerts display after the first timer alert. If the Wrap Up form is opened automatically, the Cancel button is greyed out, and cannot be used. If you close the Wrap Up form window, information you entered, if any, is saved.

Using manual Wrap Up forms

If the Wrap Up form is opened manually, you can close the Wrap Up form without saving the details by selecting the Cancel button.

Reviewing Your Statistics

You can review statistics by clicking Statistics in the Communication Tools section in the Action bar. The statistics represent activity in the last 24 hours for you or your workgroup, as indicated in the following table. Statistics are reset to zero (0) at midnight, company time.

This label	Shows this information
Session	
Last Update	Last time statistics were updated (agent-specific)
Logged in for	Login duration time (agent-specific)

Talk Time	Duration of the talk time for all the agent's phone interactions. Example:
	 ■ 4 calls
	     ■ 1 ACD Call: 30 minutes talk time
	     ■ 1 Outbound call: 10 minutes
	     ■ 1 Inbound call: 14 minutes
	     ■ 1 Web Call-back call: 15 minutes
	     ■ Talk time is 69 minutes

This label	Shows this information

Time to Answer	Average time to answer for all types of interactions for all the workgroups that the agent is assigned to.
	
	Example:
	
	■ Agent is member of workgroup 1, 2 and 3:
	
	   ■ Average time to answer for workgroup 1: 2 minutes
	
	   ■ Average time to answer for workgroup 2: 4 minutes
	
	   ■ Average time to answer for workgroup 3: 6 minutes
	
	   ■ Average Time to answer: 4 minutes

Offline Messages	Number of emails in your queue or the number of messages you are set up to receive (agent-specific)
Voice	Number of calls taken by the agent. This is agent specific and does not include the workgroup totals.
# Calls in queue	Number of calls in the queue for all the workgroups that the agent is assigned to
Longest Wait	The longest time that a call has been in the queue. This period is calculated by including all the calls in all the workgroups that the agent is assigned to.
Current State	Indicates the state of voice calls, for example, Available, Unavailable, and so on.
Voicemail	Number of ACD voicemails taken by the agent.
# Vmails in Queue	Number of ACD voicemails in the queue for all the workgroups that the agent is assigned to.
Current State	Indicates the state of ACD voicemails, for example, Available, Unavailable, and so on.
Email	Number of ACD emails taken by the agent.
# Emails in Queue	Number of ACD emails in the queue for all the workgroups that the agent is assigned to.
Current State	For ACD emails (agent-specific), for example, Available, Unavailable, and so on.

Viewing Interaction Histories

Oracle Contact On Demand tracks what happens to each customer interaction in a separate file, called an interaction history. Similar to a log file, the interaction history includes such information as the agent, priority, and routing for the voicemail. Interaction histories are stored as attachments to the activity records.

To see the interaction history

1 Select the activity.

2 On the Detail page, scroll down to the Attachments sections.

3 Click View in the Interaction History row.

4 To see further details, click the specific link in the history.

For example, you can click this link to review the reply you sent to an email: Saving the transcript of the email reply.

Monitoring Agents

Before you begin. To perform this procedure, you need to be set up as a Supervisor in Oracle Contact On Demand.

You can use the monitor feature as a coaching tool to help agents best deal with customer issues. When you monitor an agent, they do not know when you are listening to their communications.

To monitor an agent's call

1 In the Communication Tools section in the Action bar, navigate to Supervisor, then Monitor.

2 In the Monitor Agent window, select the Agent Name.

TIP: To find the agent in the list, use the Search for an Agent field.

3 Select the monitoring or recording control for the current call:

- **Listen.** You can hear the conversation, but neither the customer nor agent can hear you.

- **Whisper.** You can hear the conversation and can coach the agent. The customer cannot hear you.

- **Take Over.** You take control of the phone call with the customer. This disconnects the agent from the call and the Wrap Up form appears on the agent's screen.

- **Join.** You join the conversation. Both the agent and customer hear you.

- **Record/Stop Recording.** You record the conversation. When you stop recording, the wav file is stored as an attachment to this activity in the interaction history.

- **Log Out Agent.** You sign out the agent from the application. Use this option for signing out remote agents that have left their workstation. When you select this option, a message appears asking you if you want to disconnect the channel. Selecting Yes disconnects the phone call the agent was on.

To listen to an agent's recording

1 In the Communication Tools section in the Action bar, click Supervisor, and select Recordings.

This displays the recordings made by the supervisor while monitoring an agent.

NOTE: Recordings made by the agent are available in the Interaction History.

2 In the Recordings window, select the recording.

TIP: To find the recording in the list, complete the User, From and To fields and click Search. You can also use the calendar icons to complete the From and To fields.

3 Select the recording control for the current recording:

■ **Play.** You can play the selected recording.

■ **Close.** You stop the recording and close the Recordings window.

TIP: If you have problems listening to recorded messages, change the default media player on your machine.

Communication Activities List Page (Oracle Contact On Demand)

The Activities List page for Oracle Contact On Demand shows the subset or list of customer interactions you selected in the Communication Homepage. From the Activities List Page, you can review multiple interactions at a glance. You can also select one to review or update.

How to view the Activities List page

1 Click the Calls, Voicemail, or Email tab.

2 In the Inbox section, click the Show Full List link.

The Activities List page displays a list of all customer interactions.

You can determine the period during which the Communication Homepage Inbox displays the current and completed activities in your personal profile. For more information, see Updating Your Personal Details (on page 836).

Using the drop-down menu, you can also switch to another list. The drop-down list contains both standard lists distributed with the application and custom lists for your company. For a description of the standard lists, see the Communications Lists Section table in Working with the Communication Homepage (on page 435).

NOTE: Activities include Appointments, Tasks, and Communication Activities. You cannot delete Oracle Contact On Demand Activities from the Communications Tab, Calendar or Home pages.

The following table describes what you can do from the Activities List Page:

To do this	Follow these steps
Create a filtered list	Click the Manage Lists link in the Contacts title bar, and then click New List. This opens a wizard to guide you through the process.
Create a task record	Click New Task on the title bar. On the Task Edit page, enter the required information and save the record.

To do this	Follow these steps
Find an activity	Click the Subject column header. Then click on a letter in the alphabet bar. For activities beginning with numbers, click 0-9.
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select the number of records to be seen at any one time.
View a different subset of activities	Click the drop-down list on the title bar and change the selection. The drop-down list contains all filtered lists available to you.
View activity details	Click the Subject for the activity you want to view. This opens the Detail page.
View all activities at your company	In the title bar, click the drop-down list and select an item.

Oracle Contact On Demand Toolbar

Oracle Contact On Demand adds two sections to the Action bar: Communication Tools and Voice Controls. This table describes the options you might see in these two areas, depending on your responsibilities.

Button	Description
Communication Tools	
Available/Unavailable	Allows you to change your work status to Available or Unavailable for accepting phone calls.
Dial	Allows you to place an internal call or outbound call.
Supervisor	Allows supervisors to monitor and record agent’s calls and listen to Agent's recordings.
User Preference	Allows you to change the phone from which you accept incoming calls as well as other settings.
Statistics	Tracks your session statistics. For more information, see Reviewing Your Statistics (on page 451).
Voice Controls	Specific to each of the two phone lines in use.
Answer	Accepts call-backs (used when working On Hook),
Decline	Declines a call-back or declines a call routed to you.
Hangup	Ends an active call.
Hold	Places a call on hold, which allows you to make an outbound call to an external source. Click this button a second time to return to the call.
Transfer	Transfers an active call to another agent, group or external source.

Button	Description
Record	Records the active call, which is saved as a wav file and can be played on your local media player.

Communication Activity Fields (Oracle Contact On Demand)

When you click Edit from the Call, Voicemail, or Email Detail pages, the Activity Edit page opens with the information extracted from the Wrap Up form for the activity.

NOTE: Company administrators can customise your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information that you see on screen might differ from the standard information described in this table. Not all fields in the application are editable. If your company administrator customises the Activity record type so that additional fields are displayed as required, then this customisation prevents Oracle CRM On Demand creating Activity records for new interactions.

The following table provides additional information regarding some fields.

NOTE: All times are shown in number of seconds.

Field	Description
Key Activity Information	
Owner	See Owner in Wrapping Up Communication Activities (on page 449).
Subject	See Subject in Wrapping Up Communication Activities (on page 449).
Priority	See Priority in Wrapping Up Communication Activities (on page 449).
Origin	See Origin in Wrapping Up Communication Activities (on page 449).
Destination	See Destination in Wrapping Up Communication Activities (on page 449).
Status	See Status in Wrapping Up Communication Activities (on page 449).
Type	See Type in Wrapping Up Communication Activities (on page 449).
Activity Subtype	See Activity Subtype in Wrapping Up Communication Activities (on page 449).
Resolution Code	See Resolution Code in Wrapping Up Communication Activities (on page 449).
Key Statistics	
Queue Hold Time	Time in seconds that the interaction is in the queue before it is assigned to an agent.
Start Time	Time, date and timestamp the communication is assigned to the agent.

Field	Description
End Time	Time, date and timestamp that the communication is wrapped up.
Total Hold Time	Time in seconds that the caller is selecting options from the menu prompts combined with queue hold time.
Assigned Queue	Name of group to which the interaction is routed.
IVR Time	Time in seconds that the customer is selecting options from the menu prompts. For email, this shows 0.
Interaction Time	Time in seconds between start time and end time.
Wrap Up Time	Time in seconds that the agent spends in wrap up (with the Wrap Up form open).
Handle Time	Sum of interaction time and wrap up time.
Queue Hold Time	Time in seconds that the caller is on hold after entering IVR information.
Related Items	See Related Items in Wrapping Up Communication Activities (on page 449).
Additional Information	
Modified By	See Modified By in Wrapping Up Communication Activities (on page 449).
Description	See Description in Wrapping Up Communication Activities (on page 449).

Call, Voicemail, and Email Detail Pages

Click a topic to see instructions for doing the following from the Call, Voicemail, or Email Detail page:

- Viewing Interaction Histories (on page 452)
- Linking Records to Your Selected Record (on page 104)
- Attaching Files and URLs to Records (on page 150)

Oracle Contact On Demand administrators can create customisable Call, Voicemail, and Email detail pages. For more information on page layouts, see Customising Static Page Layouts.

NOTE: You can create page layouts for calls, voicemails, and emails in Oracle Contact On Demand. Dynamic page layouts are not supported in Oracle Contact On Demand.

You can edit the layout of your Call, Voicemail and Email detail pages to display only the sections that you use regularly. Editing the page layouts also accelerates the speed at which your pages load and eliminates clutter.

To edit the layout of Calls, Voicemail and Email detail pages

1 Click a call, voicemail, or email to open the corresponding detail page.

2 Click the Edit Layout link located to the right of the detail page.

3 Using the arrows, move the sections (content) from the Available Related Information column to the Displayed Related Information column.

4 Click Save.

NOTE: You can also collapse and expand the sections you use most frequently or infrequently. If you rarely use a section, keep it collapsed. Collapsing sections improves the speed at which the page reloads. You can also use inline editing to edit frequently used fields. For more information on inline editing, see Updating Record Details (on page 103).

Related Topics

See the following topics for related information:

■ Communication Activity Fields (Oracle Contact On Demand) (on page 456)

■ About Oracle Contact On Demand (on page 432)

7   Social Networking

Oracle CRM On Demand allows you to work with social networking tools such as Oracle Social Engagement and Monitoring so that you can engage with your customers through social media.

About Oracle Social Engagement and Monitoring

Oracle Social Engagement and Monitoring is a separate application that monitors social media sites for comments about your company, to help you to respond appropriately to such comments. When an Oracle Social Engagement and Monitoring user detects a comment that contains an issue or complaint that needs to be addressed through a service request in Oracle CRM On Demand, the user can send details of the comment directly from Oracle Social Engagement and Monitoring to Oracle CRM On Demand, by clicking Send to CRMOD. When Oracle CRM On Demand receives the information, the following happens:

◼ Oracle CRM On Demand creates a social media record for the issue that includes a URL to the post, the name of the post's author, and the name of the social community where the post is located.

◼ Oracle CRM On Demand creates a social profile record (if one does not already exist) for the author of the post. If possible, Oracle CRM On Demand associates the social profile to an existing contact in Oracle CRM On Demand.

◼ Oracle CRM On Demand creates a service request record and an activity record to resolve the issue.

A customer service representative can then follow up on the service request and resolve the issue.

To enable the service request features, your company administrator must add the Oracle Social Engagement and Monitoring fields to the service request page layout for your role. For more information on the specific social media fields, see Service Request Fields (on page 421). For more information on how to add fields to a page, see Customising Static Page Layouts.

Related Topics

See the following topics for related information about social media and social profiles:

◼ Social Media (on page 459)

◼ Social Profiles (on page 463)

Social Media

Use the Social Media pages to record information about the social media postings of your contacts.

Related Topics

See the following topics for related information about social media:

- Working with the Social Media Homepage (on page 460)
- Managing Social Media (on page 461)
- Social Media Fields (on page 462)
- About Oracle Social Engagement and Monitoring (on page 459)

Working with the Social Media Homepage

The Social Media Homepage is the starting point for managing social media records.

NOTE: Your company administrator can customise the layout of your Social Media Homepage. In addition, if your user role includes the Personalise Homepages privilege, then you can add sections to the page, and remove sections from the page.

Creating a Social Media Record

To create a social media record, click the New button in the Recently Modified Social Media section of the Social Media Homepage.

Working with Social Media Lists

The Social Media Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that enable you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for social media.

Social Media List	Filters
All Social Media	All social media records to which you have visibility.
Recently Modified Social Media	All social media records to which you have visibility, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Social Media Records

The Recently Modified Social Media section shows the social media records that were modified most recently.

Click Show Full List to expand the list.

Adding Sections to Your Social Media Homepage

If your user role includes the Personalise Homepages privilege, then you might be able to add additional sections to your Social Media Homepage. Your company administrator can make sections available for display on your Social Media Homepage.

To add sections to your Social Media Homepage

1   On the Social Media Homepage, click Edit Layout.

2   On the Social Media Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page. Click Save.

Related Topics

See the following topics for related information about social media records:

■   Social Media (on page 459)

■   Social Media Fields (on page 462)

■   About Oracle Social Engagement and Monitoring (on page 459)

Managing Social Media

For step-by-step procedures that are common to many record types, see:

■   Creating Records (on page 51)

■   Updating Record Details (on page 103)

■   Linking Records to Your Selected Record (on page 104)

■   Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about social media records:

- Social Media (on page 459)
- Working with the Social Media Homepage (on page 460)
- Social Media Fields (on page 462)

Social Media Fields

The Social Media Edit page shows the complete set of fields for a social media record.

TIP: You can also edit social media records on the Social Media List page and the Social Media Detail page. For more information about updating records, see Updating Record Details.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the social media fields.

Field	Description
Author	The unique user name of the contact on a specific social media site, for example, Facebook or Twitter, who posted a message.
Community	The name of the social media site, such as Facebook or Twitter, associated with this contact. This text field has a maximum of 255 characters.
Network Message Id	An identifier to uniquely identify the message in the social media site. This text field has a maximum of 255 characters.
Post Link	A unique URL to the post on the social media site.
Unique ID	An identifier to uniquely identify the social media record. This text field has a maximum of 255 characters.
Created	The creator of the social media record, and the date and time that it was created.
Modified	The last person to modify the social media record, and the date and time that it was modified.

Related Topics

See the following topics for related information about social media records:

- Social Media (on page 459)
- Working with the Social Media Homepage (on page 460)
- About Oracle Social Engagement and Monitoring (on page 459)

Social Profiles

Use the Social Profile pages to record information about the profiles of contacts who engage in social media interactions. Oracle CRM On Demand creates a social profile for a contact when Oracle Social Engagement and Monitoring detects a social media post that needs to be addressed. For more information, see About Oracle Social Engagement and Monitoring (on page 459).

Related Topics

See the following topics for related information about social profiles:

■ Working with the Social Profile Homepage (on page 463)

■ Managing Social Profiles (on page 464)

■ Social Profile Fields (on page 465)

■ About Oracle Social Engagement and Monitoring (on page 459)

Working with the Social Profile Homepage

The Social Profile Homepage is the starting point for managing social profiles.

NOTE: Your company administrator can customise the layout of your Social Profile Homepage. In addition, if your user role includes the Personalise Homepages privilege, then you can add sections to the page, and remove sections from the page.

Creating a Social Profile Record

To create a social profile record, click the New button in the Recently Modified Social Profiles section of the Social Profile Homepage.

Working with Social Profile Lists

The Social Profile Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that enable you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for social profiles.

Social Profile List	Filters
All Social Profiles	All social profiles to which you have visibility.
Recently Modified Social Profiles	All social profiles to which you have visibility, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Social Profiles

The Recently Modified Social Profiles section shows the social profiles that were modified most recently.

Click Show Full List to expand the list.

Adding Sections to Your Social Profile Homepage

If your user role includes the Personalise Homepages privilege, then you might be able to add additional report sections to your Social Profile Homepage. Your company administrator can make report sections available for display on your Social Profile Homepage.

To add sections to your Social Profile Homepage

1 On the Social Profile Homepage, click Edit Layout.

2 On the Social Profile Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page. Click Save.

Related Topics

See the following topics for related information about social profiles:

- Social Profiles (on page 463)
- Social Profile Fields (on page 465)
- About Oracle Social Engagement and Monitoring (on page 459)

Managing Social Profiles

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 103)
- Linking Records to Your Selected Record (on page 104)
- Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the

standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about social profiles:

- ■ Social Profiles (on page 463)

- ■ Working with the Social Profile Homepage (on page 463)

- ■ Social Profile Fields (on page 465)

- ■ About Oracle Social Engagement and Monitoring (on page 459)

Social Profile Fields

The Social Profile Edit page shows the complete set of fields for a social profile.

TIP: You can also edit social profiles on the Social Profile List page and the Social Profile Detail page. For more information about updating records, see Updating Record Details.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the social profile fields.

Field	Description
Author	The unique user name of the contact on a specific social media site, for example, Facebook or Twitter, who posted a message.
Community	The social media site, such as Facebook or Twitter, where the contact was observed. This text field has a maximum of 255 characters.
Network Author Id	An identifier to uniquely identify the author in the social media site. This text field has a maximum of 100 characters.
Active	Indicates whether this social profile is active.
Contact	An existing contact within Oracle CRM On Demand.
Created	The person who created the social profile record, and the date and time that it was created.
Modified	The last person to modify the social profile record, and the date and time that it was modified.

Related Topics

See the following topics for related information about social profiles:

- Social Profiles (on page 463)

- Working with the Social Profile Homepage (on page 463)

- About Oracle Social Engagement and Monitoring (on page 459)

About Oracle Social Network

Oracle Social Network is a secure, private network that provides a range of social tools for capturing and sharing business information. If your company uses Oracle Social Network, then your administrator can integrate Oracle Social Network with Oracle CRM On Demand. After Oracle Social Network is integrated with Oracle CRM On Demand, you can share information from records of certain Oracle CRM On Demand record types as social objects in Oracle Social Network. For more information about social objects, see the help documentation for Oracle Social Network.

Depending on how your administrator configures the integration with Oracle Social Network, you might be able to share records of the following record types:

- Account

- Opportunity

- Service Request

Your administrator determines which fields from the records are displayed in the social object in Oracle Social Network. A maximum of 10 fields from a record can be displayed in a social object. If the Social related information section is available on your Detail page layout for a record type, then you can do the following for any record of that type from the Detail page of the record in Oracle CRM On Demand, provided that you have the necessary access rights to the record:

- Share the record in Oracle Social Network, if the record has not already been shared. In Oracle Social Network, you can then add other users in Oracle Social Network as members of the social object. After you share a record in Oracle Social Network, you can see the wall for the social object in Oracle Social Network in the Social section of the record Detail page in Oracle CRM On Demand.

- Join the social object, if another user already shared the record in Oracle Social Network. After you join the social object in Oracle Social Network, you can see the wall for the social object in Oracle Social Network in the Social section of the record Detail page in Oracle CRM On Demand.

- Post updates to the social object in Oracle Social Network, if you are a member of the social object in Oracle Social Network. When you update the fields on a record in Oracle CRM On Demand that are displayed in the social object in Oracle Social Network, you can post your updates to the social object in Oracle Social Network, so that the information in Oracle Social Network is kept up to date.

- Access conversations about the social object in Oracle Social Network, if you are a member of the social object. When you click a link or button in the Oracle Social Network Web applet in the Social section, Oracle Social Network opens in a separate browser window, and you can use all of the functionality that is available to you in Oracle Social Network.

For example, if you are a member of the team for an opportunity in Oracle CRM On Demand, you can do the following:

- In Oracle CRM On Demand, share the opportunity as a social object in Oracle Social Network.

- In Oracle Social Network, add the other members of the opportunity team to the new social object. You can also add other Oracle Social Network users to the social object, even if the Oracle Social Network users are not users in Oracle CRM On Demand.

You and the other members of the social object can then start and participate in conversations about the social object for the opportunity in Oracle Social Network.

Related Topics

See the following topic for related information:

- Working with Oracle Social Network (on page 467)

Working with Oracle Social Network

This topic describes how to:

- Share a record from Oracle CRM On Demand in Oracle Social Network.

- Join a social object in Oracle Social Network from a record detail page in Oracle CRM On Demand.

- Post updates to the fields in a social object in Oracle Social Network.

- Access all of the conversations that you are part of in Oracle Social Network.

Before you begin. To perform the tasks described in this topic, you must have the Oracle Social Network Integration privilege in your user role in Oracle CRM On Demand. To allow you to share and update records in Oracle Social Network, your administrator must make the Social related information section available in the Detail page layout for the record type for your user role. To allow you to access all conversations that you are part of in Oracle Social Network, your company administrator must make the Social Web tab available for your user role.

NOTE: A record can be shared in Oracle Social Network only once. After a user shares a record in Oracle Social Network, the Share button is no longer available in the Social section of the Detail page for the record in Oracle CRM On Demand. Instead, you see either the Join button or the Update button. If you are not yet a member of the social object in Oracle Social Network, then you see the Join button. If you are already a member of the social object in Oracle Social Network, then you see the Update button.

To share a record in Oracle Social Network

1 In Oracle CRM On Demand, find the record that you want to share.

   For instructions on finding records, see Finding Records (on page 68).

2 Open the record in the Detail page and scroll to the Social section of the page.

3 In the title bar of the Social section of the page, click Share.

To join the social object for a record that has been shared in Oracle Social Network

1 In Oracle CRM On Demand, in the record Detail page, scroll to the Social section of the page.

2 In the title bar of the Social section of the page, click Join.

To post updates to the fields in a social object in Oracle Social Network

1 In Oracle CRM On Demand, in the record Detail page, scroll to the Social section of the page.

2 In the title bar of the Social section of the page, click Update.

To access all of the conversations that you are part of in Oracle Social Network

■ Click the Social tab.

Related Topics

See the following topic for related information:

■ About Oracle Social Network (on page 466)

8 Partner Relationship Management and High Tech

Oracle CRM On Demand provides the following record types for Partner Relationship Management (PRM):

■ **Partners.** Use these pages to manage information about the external companies or contacts at companies who sell or service products belonging to your company.

■ **Partner Programs.** Use these pages to track the requirements and benefits for companies that are part of your company's partner programs.

■ **Applications**. Use these pages to manage the applications from new or existing partners for partnership with the brand owner company.

■ **Deal Registrations**. Use these pages to manage the deal registrations that allow partners to request exclusive rights to an opportunity from the brand owner company.

■ **MDF Requests**. Use these pages to manage the market development funds (MDF) requests for monetary funds given by a manufacturer's sales or marketing department. MDF requests help a partner to sell its products or to market the manufacturer's brand.

■ **SP Requests**. Use these pages to manage the special pricing (SP) requests from partners for a price adjustment to a product.

■ **Funds.** Use these pages to manage fund requests, credits, and approvals.

■ **Training and Certification (T&C)**. Use these pages to create awareness among the partner community about the training courses and programs offered for the products and services of the brand owner company.   T&C also helps to track the skills and competencies of the partner companies and their employees. The T&C record types are:

   ■ Courses

   ■ Exams

   ■ Certifications

   ■ Accreditations

Note: All of these record types are available only with Oracle CRM On Demand Partner Relationship Management Edition. The Funds record type is also available with Oracle CRM On Demand High Tech Edition.

Managing PRM and High Tech

For more information on managing and configuring Partner Relationship Management (PRM), see *Oracle CRM On Demand for Partner Relationship Management Configuration Guide*.

Partners

Use the Partner pages to track partner companies and their members, create partner accounts in Oracle CRM On Demand to support partner users, and set the appropriate levels of access to Oracle CRM On Demand and data visibility for each partner account.

About Partners

The Partner tab represents any external company that sells or services products belonging to the brand owner.

The Partners pages in Oracle CRM On Demand allow you to define the business information about the partner as well as the partnership information between the brand owner and the partner. Examples of partner profile information are company name, address, phone numbers, fax number, Web site, annual revenue, number of employees, market, industry, description of business, and so on.

About Partner Accounts

A *PRM partner account*, also known as a managed partner account, is a partner with users in Oracle CRM On Demand. A nonmanaged partner account has no users in Oracle CRM On Demand. A PRM partner account is present in both the Account tab and the Partner tab and has the following attributes:

■ It is an account with the account type set to Partner.

■ The managed partner flag value is set to Y.

■ The partner organisation status is set to Active.

For organisations that are both accounts to whom sales representatives sell and PRM Partners, you must create two records: an account record and a partner record.

The partner record type is a subclass of the account record type, therefore, custom fields that are added to the account record type are also available for the partner record type. However, the reverse is not true: custom fields added to the partner record type are not available for the account record type.

In general, keep partner-specific attributes in the Partners tab, and keep account-specific attributes that are not related to the partnership in the Accounts tab. However, sometimes you might want to have a partner-specific attribute available on the Accounts tab. In this case, you can add custom attributes to the account record type. These attributes become part of the Partner record type automatically.

When you view the partner account from the Accounts tab, you can see the Account Type field, and it is set to Partner. When you view a partner account from the Partners tab, the Account Type field is not displayed, because the only value that a partner account can have is Partner.

NOTE: While the partner organisation status is set to Active, the account type of a partner account must be set to Partner.

Working with the Partners Homepage

The Partners Homepage is the starting point for managing partners.

NOTE: Your company administrator can customise the layout of your Partners Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Partner Account

You can create a partner account by clicking the New button in the Recently Modified Partners section. For more information on creating partners, see Creating Records (on page 51) and Partner Fields (on page 475).

TIP: You can indicate partner hierarchies, such as a company that is a subsidiary of another company by selecting parent accounts. For more information about partner hierarchies, see Specifying Parent Accounts (on page 273).

Working with Partner Lists

The Partner Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for partners.

Partner List	Description
All Partners	Filters all partners to which you have visibility, regardless of owner.
My Partners	Partners with your name in the Owner field.
Recently Created Partners	All partners, sorted by the created date.
Recently Modified Partners	All partners, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Partners

The Recently Modified Partners section shows the partners that you modified most recently.

To expand the list, click the Show Full List link.

Adding Sections to Your Partners Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Partners Homepage:

- All Active Partners

- All Inactive Partners

- Recently Created Partners

- Recently Modified Partners

- One or more report sections (your company administrator can make report sections available on your Partners Homepage)

To add sections to your Partners Homepage

1 On the Partners Homepage, click Edit Layout.

2 On the Partners Homepage Layout page, click the arrows to add or remove sections and to organise the sections on the page.

3 Click Save.

Managing Partner Accounts

To manage partner accounts, do the following tasks:

- Activating and Inactivating Partner Accounts (on page 473)

- Searching For Partner Accounts (on page 474)

- Deleting Partner Accounts (on page 474)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)

- Updating Record Details (on page 103)

- Linking Records to Your Selected Record (on page 104)

- Working with Lists (on page 112)

- Tracking Account Partners and Competitors (on page 279)

- Tracking Relationships Between Accounts (on page 275)

- Adding Notes (on page 143)

- Attaching Files and URLs to Records (on page 150)

- Viewing Audit Trails for Records (on page 164)

NOTE: When you create a partner account and set the Partner Organization Status field on the account to Active, a book is automatically created for the partner account. The automatically generated name of the book

includes the name of the partner account. When a user is added to the partner organization, that is, when the partner account is selected in the Partner Organization field on the user's record, the user is also associated with the book that was automatically created for the partner account. If the user's partner organization is later changed to a different partner organization, then the user is automatically removed from the partner book for the old partner organization and added to the correct partner book for the new partner organization.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Activating and Inactivating Partner Accounts

If a partnership has been suspended or terminated, you can deactivate that partner account. By deactivating the partner account, you can allow it to remain in Oracle CRM On Demand to be activated again later.

To activate or deactivate a partner account

1   Navigate to the Partner Edit page.

2   In the Partner Organisation Status list, select Active to activate the partner account, or select Inactive to deactivate the partner account.

3   Click Save.

   NOTE: Deactivating a partner account does not allow you to change the Account Type value from the Accounts tab, or delete the account from the Accounts tab. If an account is active, you can neither delete it nor change its Account Type value from the Accounts tab.

Converting Accounts to Partner Accounts

In Oracle CRM On Demand you can convert accounts to partner accounts if your access levels permit you to do so.

Before you begin. Your company administrator must have added the Managed Partner check box to the detail page.

To convert an account to a partner account

1   On the Account List, select the account that you want to convert to a partner account.

2   On the Account Detail page, click Edit.

3   On the Edit Account page, change the account type to Partner.

4   Select the Managed Partner check box, and then click Save.

NOTE: If the Partner record type is configured in the user mode of record ownership, then when you complete this task, the name of the Owner field automatically changes to the name of the user performing the conversion, and the new partner is added to the owner's partner team.

To ensure that a partner account cannot revert to a regular account

1   Navigate to the Partner List on the Partner Tab, and select the partner account.

2   On the Partner Detail page, click Edit.

3   On the Edit Partner page, change the status of the partner organisation to Active.

After you set the status to Active, the partner account cannot be changed to a regular account.

Searching for Partner Accounts

You can search for partner accounts by using the Advanced Search functionality in the action bar. You must specify the following search criteria:

- Field is set to Account Type

- Condition is set to Equal to

- Filter Value is set to Partner

To search for PRM partner accounts (managed partner accounts), you must specify the search criteria in the preceding list, and you must set the following search criteria:

- The field is set to Managed Partner Flag.

- The condition is set to Equal to.

- The filter value is set to Y.

For more information on searching for records, see: Finding Records (on page 68).

Deleting Partner Accounts

Because partner accounts can also be used as accounts, partner accounts might be associated with opportunities as well as with other records. Deleting a partner account might generate errors because of these associations.

Because accounts can also be used as partner accounts, deleting an account with an account type of Partner from the Accounts tab might also generate errors. As a result, you cannot delete partner accounts from the Partners tab. You can only deactivate partner accounts. If the account has no other use, and you want to delete it, it is possible to delete the inactive partner account from the Accounts tab.

When deleting an account that is of type partner from the Accounts tab, Oracle CRM On Demand checks to ensure the partner organisation status is Inactive, which prevents accidental deletion of an active partner record. For information about deleting and restoring records, see Deleting and Restoring Records (on page 161).

Partner Fields

Use the Partner Edit page to add a partner or update details for an existing partner. The Partner Edit page shows the complete set of fields for a partner.

TIP: You can also edit partners on the Partner List page and the Partner Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Partner Information	
Partner Name	The name of the partner. To avoid duplicate records, make sure that you follow the naming conventions that your company has set up for abbreviations, capitalisation, and so on.
Primary Partner Type	Select the partner type you want to use as the primary one for this partner account.
Location	The type of facility operated by the partner at this site, such as Headquarters.
Partner Organisation Status	Indicates whether the partner account is active or inactive.
Parent Account	The name of the company that the partner is a subsidiary of.
Main Phone #	The primary phone number used to reach the partner.
Main Fax #	The primary fax number for the partner.
Web Site	URL address for the partner.
Price List	The price list to which the partner account is associated. Typically this price list is the one that stores the partner's purchase cost.
Additional Information	
Invoicing and Shipping Addresses	Selecting a country determines the labels for the remaining address fields, according to that country{\f2 '}s address convention. The screen might refresh to display the field names.

NOTE: If shared addresses are set up for your company, the billing and shipping addresses are read-only, and the address fields change to meet   the requirements for shared addresses. For more information on shared addresses, see Addresses. |

Field	Description
Owner	The alias of the owner of the partner record.
	Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. To reassign ownership of a partner record, you must have the Read/Edit access level setting for the record.
	The value in the Owner field affects which records are included in the reports that you or your managers run.
	Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Channel Account Manager	The channel account manager is responsible for maintaining the relationship between the partners and the brand owner company. Channel account managers serve as the primary contact for the partner.
Number of Active Users	This is a calculated field that determines the current number of active users in Oracle CRM On Demand for the partner.
Maximum Number of Users	The maximum number of users that a partner organisation can have. A partner cannot have more users than the number defined in this field.
Remaining Number of Users Available	This is a calculated field that equals the difference between the Maximum Number of Users field and the Current Number of Active Users field. When the value of this field is 0 (zero), then you cannot add any more active users to Oracle CRM On Demand.
Description	Additional information about the partner. This field has a limit of 2,000 characters.

Partner Programs

Use the Partner Program pages to do the following:

- Manage different types and levels of partner programs.
- Specify different types of partners.
- Administer the partner program memberships.

A *partner program* describes the requirements and benefits for the partner when the partner is a member of the partner program. Partner programs are designed to recruit partners by the company that owns the brand.

Working with the Partner Programs Homepage

The Partner Programs Homepage is the starting point for managing partner programs.

NOTE: Your company administrator can customise the layout of your Partner Programs Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Partner Program

You can create a partner program by clicking the New button in the Recently Modified Partner Programs section. For more information, see Creating Partner Programs (on page 479) and Partner Program Fields (on page 482).

Working with Partner Program Lists

The Partner Program Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for partner programs.

Partner Program List	Description
Recently Created Partner Programs	Filters all partner programs, sorted by the created date.
Recently Modified Partner Programs	Filters all partner programs, sorted by the modified date.
All Partner Programs	This list is not filtered. It displays all partner programs to which you have visibility, regardless of who owns the partner program.
My Partner Programs	Filters partner programs with your name in the Owner field.
My Recently Created Partner Programs	Filters partner programs with your name in the Owner field, sorted by the created date.
My Recently Modified Partner Programs	Filters partner programs with your name in the Owner field, sorted by the modified date.
All Inactive Partner Programs	Filters all partner programs with a status of Inactive.
All Active Partner Programs	Filters all partner programs with a status of Active.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Partner Programs

The Recently Modified Partner Programs section shows the partner programs that you modified most recently.

To expand the list, click the Show Full List link.

Adding Sections to Your Partner Programs Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Partner Programs Homepage:

■ All Active Partner Programs

■ All Inactive Partner Programs

■ Recently Created Partner Programs

■ Recently Modified Partner Programs

■ My Recently Created Partner Programs

■ My Recently Modified Partner Programs

■ One or more report sections (your company administrator can make report sections available on your Partner Programs Homepage)

To add sections to your Partner Programs Homepage

1 On the Partner Programs Homepage, click Edit Layout.

2 On the Partner Programs Homepage Layout page, click the arrows to add or remove sections and to organise the sections on the page.

3 Click Save.

Managing Partner Programs

To manage partner programs, do the following tasks:

■ Creating Partner Programs (on page 479)

■ Managing Partner Program Memberships (on page 479)

■ Deleting Partner Programs (on page 482)

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

■ Working with Attachments (on page 147)

■ Viewing Audit Trails for Records (on page 164)

■ Tracking Account Partners and Competitors (on page 279)

■ Tracking Relationships Between Accounts (on page 275)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Creating Partner Programs

From Oracle CRM On Demand, you create a partner program by entering information in a form. You can access this form from different areas within Oracle CRM On Demand, depending on what you are working on and what tasks you want to do.

To create a partner program

1   From the Partner Program List page, click New Partner Program.

    The Partner Program Edit page appears.

2   In the Partner Program Name field, type a name for the partner program you are creating.

    TIP: Each partner program name must be unique.

3   In the Status field, select the appropriate status for the partner program.

4   Update the rest of the fields on the Partner Program Edit page as needed.

    For information on each field, see Partner Program Fields (on page 482).

5   Save the partner program.

Managing Partner Program Memberships

You can use the Program Membership New and Edit pages to perform the following administrative tasks:

■ Creating Partner Program Memberships (on page 480)

■ Changing Partner Program Membership Status (on page 480)

■ Deleting Partner Program Memberships (on page 480)

■ Attaching Files and URLs to Records (on page 150)

Creating Partner Program Memberships

After a partner's application for membership of a partner program has been approved, the partner becomes a member of the partner program.

To create partner program memberships

1 On the Partner Program Details page for the selected partner program, click New in the Program Memberships bar.

   The Program Membership New page appears.

2 In the Partner Name field, select the name of the partner that you want to add to the partner program.

3 Complete the other fields on the Partner Membership New page as needed.

   For more information on these fields, see Program Membership Fields (on page 481).

   NOTE: The state of the Active check box and value for the Status field must be in synchronisation with each other. For example, if the membership status is set to Current, then you must select the Active check box.

4 Click Save.

Changing Partner Program Membership Status

When a partner has been approved to join a partner program, and you create a new membership record for this partner program, the default status of this membership record is Current.

You can change the status of the partner program membership to one of the following values:

- Expired
- Terminated

NOTE: The state of the Active check box and value for the Status field must be in synchronisation with each other. For example, if the membership status is set to Expired or Terminated, then you must deselect the Active check box.

To change the partner program membership status

1 On the Partner Program Details page, click the Edit link of the partner program membership for which you want to change status.

2 On the Program Membership edit page, select the appropriate value from the Status drop-down.

3 Click Save.

Deleting Partner Program Memberships

If you created the program membership by mistake or you want to delete it, you can do so on the Partner Program Details page.

NOTE: You cannot delete a partner program membership if the status value for the membership is set to Current.

To delete a partner program membership

1 In the Program Memberships section of the Partner Program Details page, click Delete for the partner program membership that you want to remove.

A message box appears, asking if you are sure you want to delete the selected membership.

2 Click OK.

The selected membership is deleted.

Program Membership Fields

Use the Program Membership New and Edit pages to add a partner program membership or update details for an existing partner program membership. You can also use the Program Membership Edit page to create new partner program memberships. The Partner Program Edit page shows the complete set of fields for a partner program.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding the fields on the Program Membership pages.

Field	Description
Key Program Membership Information	
Partner Program	The partner program to which you are adding a member.
Partner Type	The type of partner (for example, reseller, solution partner, distributor, and so on) for which this partner program is created.
Partner Name	The name of the partner you are adding to the partner program.
Program Level	The Program Level at which this partner joined the program.
Active	Indicate whether the partner program membership is Active.
ID#	The membership ID number. Oracle CRM On Demand assigns the ID.
Status	The status of the membership. The valid values are: Current, Terminated, Expired, and Renewed.
Begin Date	The date on which the partner program membership starts. This field displays the current date and time by default. You can use the calendar controls to change this date.
End Date	The date on which the partner program membership is scheduled to be completed.

Field	Description
	You can use the calendar controls to change this date.

Deleting Partner Programs

You can delete a partner program from the Partner Program Details page.

NOTE: You cannot delete a partner program if the status is set to Active.

To delete a partner program

1   On the Partner Program Details page, click Delete for the partner program you want to delete.

    A message box appears, asking if you are sure that you want to delete the selected partner program.

2   Click OK.

    The partner program is deleted.

Partner Program Fields

Use the Partner Program Edit page to add a partner program or update details for an existing partner program. You can also use this page to create new partner program memberships. This page shows the complete set of fields for a partner program.

TIP: You can also edit partners on the Partner Program List page and the Partner Program Detail page. For more information, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Administrators can also grant a partner access to these detail fields, so the partner can update the information.

The following table provides additional information regarding some fields.

Field	Description
Key Partner Program Information	
Partner Program Name	The name of the partner program. To avoid duplicate records, make sure you follow the naming conventions that your company has set up for abbreviations, capitalisation, and so on.
Status	Indicates whether the partner program is Active, Inactive, or In Progress.
Begin Date	The date on which the partner program starts. This field displays the current date

Field	Description
	and time by default. You can use the calendar controls to change this date.
End Date	The date on which the partner program is scheduled to be completed. You can use the calendar controls to change this date.
Partner Type	Determines the type of partner (for example, reseller, solution partner, distributor, and so on) for which this partner program is created.
Program Type	Determines the type of program you are creating, for example, deal registration.
MDF Allowed	Allows MDF (market development funds). Market development funds are monetary funds given by a manufacturer's sales or marketing department to help a partner sell its products or to market the manufacturer's brand. If you select MDF Allowed, any partner who is a member of this partner program is entitled to market development funds.
Special Pricing Allowed	Allows special pricing authorisation. Special pricing authorisation allows partners to request a special price for a product or group of products being sold. This price is usually requested so the partner can stay competitive or make a specific margin. If you select Special Pricing Allowed, any partner who is a member of this partner program is entitled to special pricing.
Deal Registration Allowed	If you select Deal Registration Allowed, any partner who is a member of this partner program is entitled to deal registration.
Description	Additional information about the partner program. This field has a limit of 2,000 characters.
Additional Information	
Owner Full Name	The owner of the partner program record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. To reassign ownership of a partner program record, you must have the Read/Edit access level setting for the record. The value in the Owner field affects which records are included in the reports that you or your managers run. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

Applications

An *application* is the means by which a new or existing partner applies for a partnership with the brand owner. The brand owner then reviews, approves, or rejects the application. You can populate applications with data from the brand owner's portal. A partner application allows the brand owner to efficiently review, reject, and approve applications. The brand owner can also refer to application information while working in Oracle CRM On Demand.

Working with the Applications Homepage

The Applications Homepage is the starting point for managing partner applications.

NOTE: Your company administrator can customise the layout of your Applications Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating an Application

You can create an application by clicking the New button in the Recently Modified Applications section. For more information, see Creating Records (on page 51) and Applications Fields (on page 490).

You can use Web services to populate applications from a partner portal. You can also use the import tool in Oracle CRM On Demand to import applications. For more information on importing applications, see Importing Applications (on page 490).

Working with Applications Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for applications.

Applications List	Description
All Applications	This list displays all records to which you have visibility, regardless of who owns the list. It does not filter applications.
All Submitted Applications	Filters applications with the status of Submitted.
All Rejected Applications	Filters applications with the status of Rejected.
All Approved Applications	Filters applications with the status of Approved.
My Applications	Filters applications with your name in the Owner field.
All Recently Created Applications	Filters applications sorted by the date on which the application was created.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing My Recently Modified Applications Section

The My Recently Modified Applications section shows the applications that you own and that were recently modified. To expand the list, click the Show Full List link.

Adding Sections to Your Applications Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Applications Homepage:

- Application Lists

- All Applications

- All Rejected Applications

- All Approved Applications

- All Submitted Applications

- My Applications

- All Recently Created Applications

- One or more report sections (Your company administrator can make report sections, such as the Applications Analytics Report, available on your Applications Homepage.)

To add sections to your Applications Homepage

1 On the Applications Homepage, click Edit Layout.

2 On the Applications Homepage Layout page, click the arrows to add or remove sections and to organise the sections on the page.

3 Click Save.

Managing Applications

To manage applications, perform the following tasks:

- Creating Applications (on page 486)

- Submitting Applications for Approval (on page 487)

- Reviewing Applications (on page 487)

- Rejecting Applications (on page 488)
- Recalling Applications (on page 488)
- Cancelling Applications (on page 489)
- Deleting Applications (on page 489)
- Importing Applications (on page 490)
- Applications Fields (on page 490)

For additional procedures that are common to all records, see Working with Records (on page 46).

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 103)
- Linking Records to Your Selected Record (on page 104)
- Working with Lists (on page 112)
- Working with Attachments (on page 147)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Creating Applications

From Oracle CRM On Demand, you create an application by entering information in a form.

To create an application

1 From the Application List page, click New.

2 In the Application Name field, enter a name for the application that you are creating.

   TIP: Each application name must be unique.

3 In the Application Submitted By section, enter your first and last name in the appropriate fields.

4 Update the rest of the fields on the Application Edit page as needed.

   For information on each field, see Applications Fields (on page 490).

5 Save the application.

Submitting Applications for Approval

A partner application allows the brand owner to review, reject, and approve applications efficiently.

Before you begin. The application must first be created. For more information on creating applications, see Creating Applications (on page 486). A workflow rule must be created that assigns an appropriate user as the approver for applications. For more information on creating workflow rules, see Creating Workflow Rules.

To submit an application for approval

1   Select the application for which you want to submit an application from the All Applications section on the Applications Homepage.

    For information on selecting applications, see Finding Records (on page 68).

2   On the Applications Detail page, click the Edit button.

3   On the Applications Edit page, select Submitted from the Submission Status field. Then click Save.

    After the Submission Status field has been changed to Submitted, and the record has been saved the following occurs:

    ■   The approval status is set to Pending Approval.

    ■   The submission date is automatically set to the current timestamp.

    ■   The approval of the application begins. A workflow rule sets the application's Approver field to the appropriate user.

    ■   The approver is added to the team of the application if the approver is not already present.

    ■   A workflow rule sends email notifications if it has been configured to send emails.

Reviewing Applications

A brand owner must recruit suitable partners for the partner programs. When prospective partners apply for partnership, or existing partners apply for additional program memberships with the brand owner, Oracle CRM On Demand allows the brand owner to review the applications. The brand owner can then approve or reject the applications.

To review an application

1   From the Applications List page, click the name of the application that you want to review.

2   On the Applications Detail page, review the appropriate fields.

3   If you want to make changes, such as approving or rejecting an application, click Edit.

4   On the Application Edit page, make the necessary changes to the application. Then click Save.

Approving Applications

Brand owners can use Oracle CRM On Demand to approve partner applications that they consider to be acceptable.

NOTE: You can approve only partner applications for which you are designated the current approver.

To approve a partner application

1   From the Applications List page, click the name of the partner application that you want to approve.

2   On the Application Details page, click Edit.

3   Change the Approval Status to Approved, then click Save.

Rejecting Applications

As an application goes through the approval chain, an approver can reject the application.

Before you begin. The application must have the submission status of Submitted.

To reject an application

1   Select the application that you want to reject from the All Applications section on the Applications Homepage.

    For information on selecting applications, see Finding Records (on page 68).

2   On the Application Detail page, click the Edit button.

3   On the Application Edit page, select Rejected from the Approval Status field. Then click Save.

    When you change the approval status to Rejected and click Save, the following occurs:

    ■   The submission status of the registration remains in the Submitted state.

    ■   The date is removed from the Approved Date field. However, the submitted date remains in the Submitted Date field.

        Note: If the application has not been approved, no date appears in the Approved Date field.

    ■   A workflow rule creates a new task record to track the return action of the approver if the workflow rule has been configured.

    ■   A workflow rule sends appropriate email notifications if it has been configured to send emails.

Recalling Applications

As an application goes through the approval chain, a partner can recall the application.

Before you begin. The application must have the submission status of Submitted and the approval status of Pending Approval.

To recall applications

1 Select the application that you want to recall from the All Applications section on the Applications Homepage.

For information on selecting applications, see Finding Records (on page 68).

2 On the Application Detail page, click the Edit button.

3 On the Application Edit page, select Recalled from the Submission Status field. Then click Save.

When you change the submission status to Recalled, the following occurs:

■ The approver status is reset to blank.

■ A workflow rule creates a new task to track the approval action if the workflow rule has been configured.

■ A workflow rule sends appropriate email notifications if it has been configured to send emails.

Cancelling Applications

As an application goes through the approval chain, an approver can cancel the application.

Before you begin. The application must have an approval status of Approved.

To cancel an application

1 Select the application that you want to cancel from the All Applications section on the Applications Homepage.

For information on selecting applications, see Finding Records (on page 68).

2 On the Applications Detail page, click the Edit button.

3 On the Applications Edit page, select Cancelled from the Approval Status field. Then click Save.

Deleting Applications

You can delete an application from the Application Details page.

To delete an application

1 On the Application Details page, click Delete.

A message box appears, asking if you are sure that you want to delete the application.

2 Click OK.

The application is deleted.

Importing Applications

In most cases, brand owners choose to populate initial partner applications from another source. Brand owners can populate partner applications by using the Import tool in Oracle CRM On Demand, or they can use Web services to load application data from a partner portal. For more information on importing data using Oracle CRM On Demand, see Importing Your Data.

Applications Fields

Use the Applications Edit page to add an application or update details for an existing application. The Applications Edit page shows the complete set of fields for an application.

TIP: You can also edit applications on the Applications List page and the Applications Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Company Profile	
Name	The name of the company. To avoid duplicate records, make sure that you follow the naming conventions that your company has set up for abbreviations, capitalisation, and so on.
Location	The location of the company.
Main Phone #	The primary phone number of the company.
Main Fax #	The primary fax number for the company.
Web Site	URL address for the company.
Number of Employees	The total number of employees in the company.
Annual Revenue	The total annual revenue for the company.
Industry	The industry in which the company competes.
Country	The country portion of the company's address.
Address 1	Additional information for the company's address.

Field	Description
Address 2	Additional information for the company's address.
City	The city portion of the company's address.
Province	The state or province portion of the company's address.
Post Code	The postal code portion of the company's address.
Application Submitted by	
First Name	The submitter's first name.
Last Name	The submitter's last name.
Work Phone #	The submitter's work phone number.
Cellular Phone #	The submitter's cellular phone number.
Work Fax #	The submitter's work fax number.
Email Address	The submitter's email address.
Job Title	The submitter's job title.
Submission Status	The current submission status of the application. The values are: Not Submitted, Submitted, or Recalled.
Current Approver	The name of the person who has the authority to approve the application.
Country	The country portion of the submitter's address.
Address 1	Additional information for the submitter's address.
Address 2	Additional information for the submitter's address.
City	The city portion of the submitter's address.
Province	The state or province portion of the submitter's address.
Post Code	The postal code of the submitter's address.
Partnership Information	
Approval Status	The current approval status for the application. The values are: Pending Approval, Approved, Rejected, or Cancelled.
Submitted Date	The date on which the application was submitted.
Approved Date	The date on which the application was approved.
Processed By: Name	The name of the person who has reviewed and either accepted or rejected this application.
Reject Reason	The reason why the application was rejected. The values are: Duplicate,

Field	Description
	Incorrect Information, Insufficient Information, or Other.
Partner Program	The name of the partner program associated with the application.
Program Level	The level of the partner program associated with the application.
Partner Type	The type of partner for which the application is being submitted.
Expected Partnership Benefits	The expected benefits from this partnership. It is a text field with a limit of 500 characters.
Existing Partnerships	This field lists any existing partnerships. It is a text field with a limit of 300 characters.
Additional Information	
Partner	The partner who is associated with this application.
Source	The source from where this application comes, for example, Web site, direct mail, email, and so on.
Campaign	The campaign that resulted in this partner application. This campaign is associated with this application.
Application ID	The unique identification (ID) number for this application.
Owner	The owner of the application record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

Deal Registrations

Deal registration is a process by which partners request exclusive rights to an opportunity from the brand owner. It provides partners with the means to inform the vendor about a potential opportunity, and then partners receive priority for that opportunity. Deal registrations are less speculative than leads but more speculative than opportunities, so they are considered to exist between leads and opportunities.

In most cases, a partner requests registration of a lead or opportunity that the partner discovered. However, the partner can also request registration of an opportunity that was previously offered to the partner by the brand owner.

Deal registrations help mitigate channel conflict, where partners have to compete against one another or the vendor's internal sales department for the same opportunity. Deal registrations are also beneficial in the following ways:

■ They enhance the brand owner's visibility of the opportunity pipeline of the partners.

■ They increase the brand owner's ability to upsell or cross-sell or both.

When registering a deal, the partner might not have enough information about the opportunity. For example, the partner might not know the exact nature of the products that the prospect intends to purchase. The partner might have only a vague idea of the prospect's interest, for example, *high-end servers* rather than a definitive picture of the prospect's shopping list. Therefore, when registering deals, partners can provide as little or as much information as they want.

Working with the Deal Registration Homepage

The Deal Registration Homepage is the starting point for managing deal registrations.

NOTE: Your company administrator can customise the layout of your Deal Registration Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Deal Registration

You can create a deal registration by clicking the New button in the Recently Viewed Registrations Waiting for My Approval section. For more information, see Creating Records (on page 51) and Deal Registration Fields (on page 505).

Working with Deal Registration Lists

The Deal Registration Lists section shows a number of filtered lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following are some of the sections that can be displayed on your Deal Registration Homepage.

Deal Registration Lists	Description
All Deal Registrations	This list displays all records to which you have visibility, regardless of who owns the record. It does not filter deal registrations.
Recently Modified Deal Registrations	Filters all deal registrations, sorted by the modified date.
Recently Created Deal Registrations	Filters all deal registrations, sorted by the created

Deal Registration Lists	Description
	date.
Recently Viewed Deal Registrations	Filters all deal registrations, sorted by the order of the most recently viewed.
Deal Registrations expiring in the Next 30 Days	All approved deal registrations with an expiration date that falls within the next 30 calendar days from the present date.
Deal Registrations Waiting for My Approval	All deal registrations with the approval status of Pending Approval for which you are the current approver.
Deal Registrations with no Activity in the Past 30 Days	All approved deal registrations that have seen no activity on the associated opportunity within the past 30 calendar days from the present date.
Active Deal Registrations	All deal registrations with an approval status of Approved.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Deal Registrations Waiting for My Approval

The Deal Registrations Waiting for My Approval section shows all deal registrations for which you are the current approver, but have not yet approved.

Other Sections

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Deal Registration Homepage:

■ Approved Deal Registrations

■ Deal Registrations Expiring in the Next 30 Days

■ Deal Registrations with no Activity in the Past 30 Days

■ Recently Created Deal Registrations

■ Recently Modified Deal Registrations

■ Active Deal Registrations

■ One or more report sections [Your company administrator can make report sections, such as the Approved Registrations by Deal Size (Bar chart), Approved Registrations by Age (Bar chart), Registrations by Status

(Pie chart), Registrations resulting in Win (By Period) (Bar chart), or Number (#) of registrations (By Period) (Bar chart).]

Adding Sections to Your Deal Registration Homepage

If your user role includes the Personalise Homepages privilege, you can add additional sections to your Deal Registration Homepage, depending on which sections your company administrator has made available for display on your Deal Registration Homepage.

To add sections to your Deal Registration Homepage

1 On the Deal Registration Homepage, click Edit Layout.

2 On the Deal Registration Homepage Layout page, click the arrows to add or remove sections and to organise the sections on the page. Then click Save.

Managing Deal Registrations

To manage deal registrations, perform the following tasks:

- Creating Deal Registrations (on page 496)
- Submitting Deal Registrations for Approval (on page 497)
- Approving Deal Registrations (on page 497)
- Returning Deal Registrations (on page 498)
- Rejecting Deal Registrations (on page 499)
- Resubmitting Deal Registrations (on page 499)
- Cancelling Deal Registrations (on page 500)
- Ending the Period for Deal Registrations (on page 500)
- Updating Deal Registrations (on page 501)
- Linking Products to Deal Registrations (on page 501)
- Calculating the Deal Size (on page 501)
- Associating Deal Registrations with Opportunities (on page 502)
- Converting Deal Registrations to Accounts, Contacts, or Opportunities (on page 502)
- Access Profile and Role Settings for Converting Deal Registrations (on page 503)
- Deal Registration Fields (on page 505)

Creating Deal Registrations

From within Oracle CRM On Demand, partners create a deal registration by entering information in a form. The partner can access this form from different areas within the application, depending on what the partner is working on and what the partner wants to do. This topic describes one method of creating a deal registration from the Deal Registrations tab. Partners can also create deal registrations using other methods, see Creating Records (on page 51).

When a partner creates a deal registration, the partner can either make it independent or associate it with an opportunity. The partner creates an independent deal registration (stand-alone registration) when the partner believes he or she has discovered a potential new business opportunity and wants to register it with the brand owner. However, the brand owner might not consider it an opportunity until it has been verified by one or more persons in the organisation.

In this case, when the partner believes he or she has discovered an opportunity, and the brand owner contends that it is not an opportunity until it has been verified and confirmed, the solution is for the partner to create a deal registration. The deal registration contains both opportunity as well as registration information. At some point, the partner submits the registration for approval and, if it is appropriate, the brand owner approves it. Prior to giving final approval for the deal registration, the brand owner associates it with an opportunity.

To create a deal registration

1   From the Deal Registration List page, click New.

2   In the Deal Registration Detail form, enter the required information.

    a   If the deal registration is for an existing opportunity, search for and select the appropriate opportunity in the Associated Opportunity field. The Associated Opportunity field should display only those opportunities to which you have visibility. The customer field is automatically populated with the name of the customer associated with the selected opportunity.

    b   If the deal registration is for a new opportunity (or for an opportunity to which you do not have visibility), select the New Opportunity check box, and enter the following information in the Opportunity Information section.

        ■   Currency

        ■   Deal size

        ■   Close date

        ■   Product interest

        ■   Next step

    c   If the deal registration is for a new opportunity, it might be for an existing customer or a new customer. If the deal registration is for an existing customer, search for and select the customer from the Associated Customer field. If the deal registration is for a new customer, select the New Customer check box, and complete the fields in the New Company information section.

        For more information about Deal Registration fields, see Deal Registration Fields (on page 505).

3 Save the record.

Submitting Deal Registrations for Approval

A *deal registration* is a request from a partner to the brand owner for exclusive rights to an opportunity. The request might or might not be granted by the brand owner. Most companies have well-defined processes to handle such requests for approval from partners. Typically, one or more employees of the brand owner evaluate the registration on a variety of criteria and decide whether to approve the request. In small companies, the employees who must approve a registration remain static; that is, the same set of approvers approve all deal registrations. However, in larger companies, the group of approvers who must approve a registration is dynamic and is based on a variety of factors, such as the deal size, partner, products, and so on.

Before you begin. Create the deal registration. For more information on creating deal registrations, see Creating Deal Registrations (on page 496). Create a workflow rule that assigns an appropriate user as the approver of deal registrations. For more information on creating workflow rules, see Creating Workflow Rules.

To submit deal registrations for approval

1 In the Submission Status field on the Deal Registrations Edit page, select Submitted.

Changing the submission status to Submitted starts the approval process. Anyone who has update access to the deal registration can start the approval process.

2 Click Save.

After the Submission Status field has been changed to Submitted the following occurs:

- The approval status is set to Pending Approval.

- The submission date is automatically set to the current timestamp.

- The routing of the registration begins. A workflow rule sets the Approver field of the deal registration to the appropriate user.

- The approver is added to the team of the deal registration if the approver is not already present.

- A workflow rule sends any email notifications if the workflow rule has been configured.

Approving Deal Registrations

Depending on the business processes for your company, more than one person within your company might be required to approve a deal registration before the deal registration is considered a valid opportunity. Currently, approval routing is a manual process and only one level of approval is supported. You must modify the current approver field to move the registration along the approval chain.

Note: You can achieve multilevel approval when each approver in the approval chain updates the Approver field for the next approver in the chain.

A deal registration can be given final approval only if it is associated with an opportunity. If the registration is not associated with an opportunity (for example, it is a stand-alone registration), it has to be linked to an existing opportunity or has to be manually converted to an opportunity. For more information on converting a

deal registration to an opportunity, see Converting Deal Registrations to Accounts, Contacts, or Opportunities (on page 502).   When a deal registration achieves final approval, the opportunity associated with it becomes visible to the partner organisation, because it might be necessary for the partner user to access the opportunity.

Note: The associated opportunity becomes visible to the partner organisation only upon approval of the deal registration. When the registration is either returned or rejected, the visibility to the associated opportunity (if any) is not granted.

Before you begin. The submission status of the deal registration must be set to Submitted before you can approve it.

To approve deal registrations

1 In the Approval Status field on the Deal Registration Edit page, select Approved.

2 Click Save.

When you change the approval status to Approved, the following occurs:

■ Oracle CRM On Demand validates that the submission status value is Submitted. If the submission status is any other value, the validation fails, and an appropriate error message is generated.

■ Oracle CRM On Demand validates that the Associated Opportunity field is populated with an opportunity.

■ Oracle CRM On Demand validates that the opportunity specified in the Associated Opportunity field is not already associated with an approved deal registration.

■ The Registered check box on the opportunity header is selected.

■ The Registration Expiration Date field on the opportunity header is populated with the expiration date for approved registration.

■ The partner information from the approved registration is copied to the opportunity header.

■ The final approver changes to the current user. The Current Approver field is not updated.

■ The approved date changes to the current date on Oracle CRM On Demand.

■ A workflow rule creates a new task to track the approval action.

■ A workflow rule sends the appropriate email notifications if the workflow rule has been configured.

Returning Deal Registrations

As a deal registration goes through the approval chain, an approver can return the registration to the creator to make changes to the deal registration parameters.

Before you begin. The deal registration must have a submission status of Submitted.

To return deal registrations

■ In the Approval Status field on the Deal Registration Edit page, select Returned. Then click Save.

When you change the approval status to Returned, the following occurs:

■ The submission status of the registration is set to Not Submitted.

■ The date is removed from the Approved Date field. However, the submitted date remains in the Submitted Date field.

■ A task record is created to track the return action of the approver.

■ A workflow rule sends the appropriate email notifications if the   workflow rule has been configured.

The creator of the deal registration can now update the deal registration and resubmit it. For more information on submitting deal registrations, see Submitting Deal Registrations for Approval (on page 497).

Rejecting Deal Registrations

As a deal registration goes through the approval chain, an approver can reject the deal registration.

Before you begin. The deal registration must have a submission status of Submitted.

To reject deal registrations

■ In the Approval Status field on the Deal Registration Edit page, select Rejected. Then click Save.

When you change the approval status to Rejected, the following occurs:

■ The submission status of the registration remains in the Submitted state.

■ The date is removed from the Approved Date field. However, the submitted date remains in the Submitted Date field.

■ A task record is created to track the return action of the approver.

■ A workflow rule creates the appropriate email notifications if the workflow rule has been configured.

Resubmitting Deal Registrations

As a deal registration goes through the approval process, the approver might require additional information to approve or reject the registration. In such cases, the approver can return the registration to the owner and specify a reason for the return. Alternatively, the owner of the registration might recall the registration in order to supply additional information.

After the registration has been returned or recalled, the owner can update it. After the owner updates the deal registration, he or she can resubmit it for approval.

Before you begin. The submission status for the deal registration must be either Recalled or Not Submitted.

To resubmit deal registrations for approval

1 On the Deal Registration Edit page, add the additional information.

2 In the Submission Status field on the Deal Registrations Edit page, select Submitted.

Changing the submission status to Submitted starts the approval process. Anyone who has update access to the deal registration can start the approval process. Then click Save.

When the Submission Status field has been changed to Submitted the following occurs:

■ The approval status is set to Pending Approval.

■ The submission date is automatically set to the current timestamp.

■ The routing of the registration begins. A workflow sets the Approver field for the deal registration to the appropriate user.

■ The approver is added to the team of the deal registration if the approver is not already present.

■ A workflow rule sends the appropriate email notifications if the workflow rule has been configured.

Cancelling Deal Registrations

The brand owner can cancel deal registrations when the Approval Status field is set to either of the following:

■ Pending approval

■ Approved

Cancelling a deal registration is not supported when the approval status is any other value.

To cancel deal registrations

■ In the Approval Status field on the Deal Registration Edit page, select Cancelled. Then click Save.

When an approved deal registration is cancelled, the following updates are made to the associated opportunity:

■ The Registered check box is not selected.

■ The Registration Expiration Date field changes to a null value.

■ The Registered Partner field changes to a null value.

Ending the Period for Deal Registrations

You can end the period for deal registrations at any time.

To end the period for deal registrations

■ In the Approval Status field on the Deal Registration Edit page, select Expired. Then click Save.

When you change the approval status to Expired, the following occurs:

■ The Registered check box on the opportunity header is not selected.

■ The date in the Registration Expiration Date field on the opportunity header returns to a null value.

■ The Registered Partner field on the opportunity header returns to a null value.

Updating Deal Registrations

You do not always have all the information you require when first creating a deal registration. Additionally, you can add product information to a registration only after the deal registration has been created. So, Oracle CRM On Demand allows you to view and modify a deal registration for which you have visibility.

When a deal registration has the status of Not Submitted or Recalled, you can edit the registration, or add or remove revenue line items. When a deal registration has any other status, you cannot make these changes.

To update a deal registration

1 On the Deal Registration List page, click Edit.

2 On the Deal Registration Edit page, make the changes that you want to the deal registration. Then click Save.

Linking Products to Deal Registrations

When you register a new opportunity you have some idea of the type and quantity of products that the prospect is interested in. It is important to save this information about the deal registration, because many companies look at the products while considering approval of the registration. Because a deal registration might be converted to an opportunity before final approval, it is important to save the product line information on the deal so that this information can be copied to the opportunity at the time of conversion.

Before you begin. Your company administrator must have made the Product Revenues related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

Create the deal registration, and set the status to Not Submitted or Recalled. You can add product lines to the deal registration after creating the registration but before submitting it for approval.

To link products to deal registrations

1 In the Product Revenues section of the Deal Registration Detail page, click Add.

2 In the fields, enter the product name, quantity, and price for the product that you want to link to the deal registration. Then click Save.

For more information on linking records, see Linking Records to Your Selected Record (on page 104).

Calculating the Deal Size

A deal registration might have zero, one, or more product line items associated with it. Each product line item might have a revenue value associated with it. You can set the deal size on the deal registration header to be the total of all the revenue line items, using the appropriate currency conversion.

Before you begin. Your company administrator must have made the Product Revenues related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To calculate the deal size

1 In the Product Revenues section of the Deal Registration Details page, click Update Deal Size.

Oracle CRM On Demand fetches the revenue from each line item and converts it to the deal currency (specified on the registration header). While performing the conversion, Oracle CRM On Demand considers the exchange date on the line item. If an exchange date has been specified for the line item, then the exchange rate on that date is used while performing the conversion. If no exchange date has been specified, then Oracle CRM On Demand uses the current date for the conversion calculations.

The converted revenue from each line item is added to a running total, and the resulting value is populated in the Deal Size field on the registration header.

2 Click Save.

Associating Deal Registrations with Opportunities

Oracle CRM On Demand allows you to associate existing deal registrations with existing opportunities and to change existing associations between the two. Also, a deal registration might be associated with an incorrect opportunity.

To associate a deal registration with an opportunity

1 On the Deal Registrations List page, click Edit for the deal registration that you want to work with.

2 In the Associated Opportunity field on the Deal Registrations Edit page, search for and select the opportunity that you want to associate the deal registration with. Then click Save.

Converting Deal Registrations to Accounts, Contacts, or Opportunities

If your user role has the appropriate set-up, you can create account, contact, and opportunity records, or merge deal registration information with existing records by converting the deal registration record. Depending on your company's settings, the new opportunity record can include information that affects revenue calculations.

Before you begin. You must do the following tasks:

■ Create the deal registration. For more information on creating deal registrations, see Creating Deal Registrations (on page 496).

■ Set up your user role and access profile settings. For more information about these settings, see Access Profile and Role Settings for Converting Deal Registrations (on page 503).

To convert a deal registration to an account, contact, or opportunity

1   Select the deal registration that you want to convert from the All Deal Registrations section on the Deal Registration homepage.

    For information on selecting deal registrations, see Finding Records (on page 68).

2   On the Deal Registration Detail page, click the Convert to Opportunity button.

3   On the Convert Deal Registration page, do one of the following:

    ■   To create new account and contact records for this deal registration, select the Auto-Create New Account and Auto-Create New Contact options.

        In the Account section, the Associated Company field for the deal registration appears in the Associated Account field by default. In the Contact section, the first name and last name for the deal registration appear by default.

    ■   To create a new opportunity and link the opportunity to an existing account and contact, select the Use Existing Account and Use Existing Contact options.

        If the registration record has an associated account, this account appears in the Associated Account field. If the registration record has an associated contact, this contact appears in the Associated Contact field.

    ■   To link the deal registration to a different account or contact, click the Lookup icon next to the Associated Account or Associated Contact fields, and select another account and contact. Make sure the correct names appear in the Associated Account and Associated Contact fields and that the Use Existing Account and Use Existing Contact options are selected.

4   To convert the deal registration to an opportunity, select Auto-Create Opportunity, and complete the fields.

    The name of the deal registration appears in the Opportunity Name field by default. Data in the revenue, close date, next step, and description fields are also carried over to the opportunity record. You can edit this data in the Convert Deal Registration page. You can also associate the deal registration with an existing opportunity. To do so, do the following:

    a   Select the Use Existing Opportunity option

    b   Select the appropriate opportunity by using the Lookup icon next to the Associated Opportunity field.

5   To convert the deal registration, click Save.

Access Profile and Role Settings for Converting Deal Registrations

To convert deal registrations to accounts, contacts, or opportunities, you must have the appropriate settings in your access profiles and in your user role. This topic describes the required settings.

Access Profile Settings for Converting Deal Registrations

The access levels that allow you to convert deal registrations are shown in the following tables. These settings are required on both your default-access profile and your owner-access profile.

The following table shows the access-levels for record types that allow you to convert deal registrations.

Record Type	Access Level
Account	Read and Edit
Contact	Read and Edit
Deal Registration	Read and Edit
Opportunity	Read and Edit

The following table shows the access-levels for related information record types that allow you to convert deal registrations.

Record Type	Related Information Record Type	Access Level
Account	Addresses	Read, Create, and Edit
Contact	Accounts	Read and Create
	Addresses	Read, Create, and Edit
Opportunity	Revenue	Read and Edit
	Contact	Read and Create

User Role Settings for Converting Deal Registrations

The role settings that allow you to convert deal registrations are as follows:

- The role must have the PRM Deal Registrations: Convert Deal Registrations privilege.

- The record-type access for the role must have the following settings:

    - The Has Access check box must be selected for the Deal Registration record type in all cases of deal registration conversion.

    - To convert (that is, associate or link) deal registrations to existing opportunities, the Has Access check box must be selected for the Opportunity record type.

    - To convert deal registrations to new opportunities, the Has Access and Can Create check boxes must be selected for the Opportunity record type.

    - To convert deal registrations to existing accounts, the Has Access check box must be selected for the Account record type.

    - To convert deal registrations to new accounts, the Has Access and Can Create check boxes must be selected for the Account record type.

■ To convert deal registrations to existing contacts, the Has Access check box must be selected for the Contact record type.

■ To convert deal registrations to new contacts, the Has Access and Can Create check boxes must be selected for the Contact record type.

NOTE: For more information on configuring Partner Relationship Management, see *Oracle CRM On Demand for Partner Relationship Management Configuration Guide*.

Deal Registration Fields

Use the Deal Registration Edit page to add a deal registration or update details for an existing deal registration. The Deal Registration Edit page shows the complete set of fields for a deal registration.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Deal Registration Key Information	
Name	The name of the deal registration. To avoid duplicate records, make sure you follow the naming conventions your company has set up for abbreviations, capitalisation, and so on.
Type	The type of deal registration. The options include: Standard and Non-Standard.
Submission Status	The submission status of the deal registration. The options include: Not Submitted, Submitted, and Recalled.
Expiration Date	The date on which the deal registration will expire.
Special Price Reqd.	Indicates whether special pricing is required for the deal registration.
Associated Lead	A unique identifier for the lead that resulted in the deal registration.
ID	The unique identifier (ID) for the deal registration.
Principal Partner	The partner account that discovered the deal registration. The partner who discovered the deal registration might no longer own it.
Principal Partner: Location	The location of the originating partner account.
Partner Programme	The partner programme to which the deal registration is attached.
Objective	The objective associated with deal registration.
Support Reqd.	Indicates whether presales support is required for the deal registration.
Opportunity Information	

Field	Description
Associated Opportunity	The name of the opportunity with which the deal registration is associated.
New Opportunity	Indicates whether the opportunity associated with the deal registration is a new one.
Currency	The selected currency for the opportunity with which the deal registration is associated.
Deal Size	The size of the deal in the units of the selected currency.
Close Date	The close date for the opportunity with which the deal registration is associated.
Product Interest	The product area in which the prospective customer is interested.
Next Step	The next logical step in the selling process for the opportunity associated with the deal registration.
Customer Information	
Associated Customer	The name of the customer organisation associated with the deal registration.
New Customer	Indicates whether the deal registration is for a new customer organisation.
Company Name	The name of the customer organisation.
Country	The country in which the customer organisation is based.
Street	The customer organisation's street address.
City	The city in the customer organisation's address.
State	The state in the customer organisation's address.
Postal Code	The postal code of the customer organisation's address.
Associated Contact	The name of an associated contact.
New Contact	Indicates whether this is a new contact.
Mr/Mrs	Indicates the appropriate salutation designation.
First Name	The customer's first name.
Middle Name	The customer's middle name.
Last Name	The customer contact's last name.
Job Title	The customer contact's job title.

Field	Description
Email	The customer contact's email address.
Telephone #	The customer contact's telephone number.
Mobile Phone	The customer contact's cell phone number.
Fax	The customer contact's fax number.
Approval Information	
Approval Status	The current status of the deal registration approval.
Current Approver	The name of the person who must approve the deal registration next.
Final Approver	The name of the person who granted final approval to the deal registration.
Submitted Date	The date on which the deal registration was submitted for approval.
Approved Date	The date on which the deal registration was finally approved.
Reject Reason	The reason for rejecting approval of the deal registration.
Description	Additional information about the deal registration. This field has as a limit of 250 characters.
Additional Information	
Owner	The owner of the deal registration record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. The value in the Owner field affects which records are included in reports that you or your managers run from Reports and Dashboard pages. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Owner Partner Account	The name of the partner account that owns the deal registration.
Originating Partner Account	The name of the partner account that discovered the deal registration. The partner who discovered the deal registration might no longer own it
Description	Enter any additional information about the deal registration.

MDF Requests

Market development funds (MDF) provide brand owners with the ability to make marketing funds available to a partner in an organised way, so that a partner can sell the brand owner's products in specific geographical areas or so that a partner can market its brand. An *MDF request* is a request for funds in which a partner asks the brand owner for funds.

Partners can request preapprovals to fund marketing activities. The MDF requests identify the details of the marketing activity and its estimated cost. The MDF request is then routed through an approval process. The brand owner provides the approved funds for the MDF request and can approve, reject, or return it.

After the marketing activities have been completed, partners can create claims to redeem the spent money that was preapproved by the brand owner.   Claims are either created against a specific MDF request or can exist independently. An MDF request can have only one claim associated with it. When the claim is approved, the fund is debited with the associated MDF request.

Working with the MDF Requests Homepage

The MDF Request Homepage is the starting point for managing market development funds (MDF) requests.

NOTE: Your company administrator can customise the layout of your MDF Request Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating an MDF Request

You can create an MDF request by clicking the New button in the Recently Modified MDF Request section. For more information, see Creating Records (on page 51) and MDF Fields.

Working with MDF Request Lists

The MDF Request Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for MDF Requests.

MDF Request List	Description
All MDF Requests	This list displays all records to which you have visibility, regardless of who owns the list. It does not filter MDF requests.
Recently Created MDF Requests	Filters all MDF requests, sorted by the created date.
Recently Modified MDF Requests	Filters all MDF requests, sorted by the modified date.
My MDF Requests	Filters MDF requests with your name in the Owner field.

MDF Request List	Description
My Recently Created MDF Requests	Filters MDF requests with your name in the Owner field, sorted by the created date.
My Recently Modified MDF Requests	Filters MDF requests with your name in the Owner field, sorted by the modified date.
All Pending MDF Requests	All MDF Requests with the approval status of Pending Approval or the claim status of Claim Submitted.
My Pending MDF Requests	MDF requests that you own with the approval status of Pending Approval or the claim status of Claim Submitted.
My Approved MDF Requests	All approved MDF requests that you own.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing My Recently Modified MDF Requests Section

The My Recently Modified MDF Requests section shows the MDF requests that you own and that were recently modified. To expand the list, click the Show Full List link.

Viewing My Pending MDF Requests Section

The My Pending MDF Requests section shows all of the MDF requests that you own with the approval status of Pending Approval or the claim status of Claim Submitted. To expand this list, click Show Full List.

Adding Sections to Your MDF Request Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your MDF Requests Homepage:

- MDF Request Lists

- All Pending MDF Requests

- Recently Created MDF Requests

- Recently Modified MDF Requests

- My Pending MDF Requests

- My Approved MDF Requests

- My Recently Created MDF Requests

■ My Recently Modified MDF Requests

■ MDF Requests Pending My Approval

To add sections to your MDF Requests Homepage

1 On the MDF Requests Homepage, click Edit Layout.

2 On the MDF Requests Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page. Then click Save.

Managing MDF Requests

To manage MDF requests, perform the following tasks:

■ Submitting MDF Requests for Approval (on page 511)

■ Recalling MDF Requests (on page 511)

■ Returning MDF Requests (on page 512)

■ Rejecting MDF Requests (on page 512)

■ Approving MDF Requests (on page 513)

■ Cancelling MDF Requests (on page 514)

■ Submitting Claims for MDF Requests (on page 514)

■ Rejecting Claims for MDF Requests (on page 515)

■ Approving Claims for MDF Requests (on page 515)

For additional procedures that are common to all records, see Working with Records (on page 46).

For procedures that are common to many record types, see the following:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

■ Working with Attachments (on page 147)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Submitting MDF Requests for Approval

Partners can request preapproval for the funding of marketing activities by submitting a market development fund (MDF) request. The MDF request includes the details of the activity and amount of funds that the partner estimates will be spent.

Before you begin. Create the MDF request. Create a workflow rule that assigns an appropriate user as the approver for MDF requests. For more information on creating workflow rules, see Creating Workflow Rules.

To submit an MDF request for approval

1   Select the MDF request that you want to submit for approval from the All MDF Requests section on the MDF Request homepage.

   For information on selecting MDF requests, see Finding Records (on page 68).

2   On the MDF Request Detail page, click the Edit button.

3   On the MDF Request Edit page, select Submitted from the Submission Status field. Then click Save.

   After you change the Submission Status field value to Submitted and save the record, the following occurs:

   ■   The approval status is set to Pending Approval.

   ■   The Submitted Date is automatically set to the current timestamp.

   ■   The routing of the MDF request begins. A workflow rule sets the Approver field for the MDF request to the appropriate user.

   ■   The approver is added to the team of the MDF request, if the approver is not already present.

   ■   A workflow rule sends email notifications.

The MDF request appears on the list of records waiting for the approver's actions and becomes read-only for the partner (owner). Further updates to the request (for example, updating the requested amounts, changing the associated fund, and so on) are not permitted. The partner can make changes to a submitted MDF request only after recalling it successfully.

Recalling MDF Requests

After a market development fund (MDF) request has been submitted, and before it has been approved, you can recall it. After you have successfully recalled the request, you can continue updating it and resubmit it for approval.

Before you begin. The MDF request must have the submission status of Submitted and the approval status of Pending Approval.

To recall an MDF request

1   Select the MDF request that you want to recall from the All MDF Requests section on the MDF Request homepage.

For information on selecting MDF requests, see Finding Records (on page 68).

2   On the MDF Request Detail page, click the Edit button.

3   On the MDF Request Edit page, select Recalled from the Submission Status field. Then click Save.

When you change the submission status to Recalled, the following occurs:

- The Approval Status is reset to a null value.

- A workflow rule creates a new task to track the action (if configured).

- A workflow rule sends the appropriate email notifications (if configured).

You can now update the MDF request and resubmit it. For more information on submitting requests, see Submitting MDF Requests for Approval (on page 511).

Returning MDF Requests

As a market development fund (MDF) request goes through the approval chain, an approver can return it to the owner to make changes or provide additional information.

Before you begin. The MDF request must have the submission status of Submitted.

To return an MDF request

1   Select the MDF request that you want to return from the All MDF Requests section on the MDF Request homepage.

For information on selecting MDF requests, see Finding Records (on page 68).

2   On the MDF Request Detail page, click the Edit button.

3   On the MDF Request Edit page, select Returned from the Approval Status field. Then click Save.

When you change the approval status to Returned and click Save, the following occurs:

- The submission status of the MDF request is set to Not Submitted.

- The date is removed from the Pre-Approval Date field. However, the submitted date remains in the Submitted Date field.

- A task record is created to track the return action of the approver.

- A workflow rule sends the appropriate email notifications.

The owner of the MDF request can now update the request and resubmit it. For more information on submitting MDF requests, see Submitting MDF Requests for Approval (on page 511).

Rejecting MDF Requests

As a market development fund (MDF) request goes through the approval chain, an approver can reject it if the requested amount for the marketing activity cannot be granted.

Before you begin. The MDF request must have the submission status of Submitted.

To reject a MDF request

1   Select the MDF request that you want to reject from the All MDF Requests section on the MDF Request homepage.

For information on selecting MDF requests, see Finding Records (on page 68).

2   On the MDF Request Detail page, click the Edit button.

3   On the MDF Request Edit page, select Rejected from the Approval Status field. Then click Save.

When you change the approval status to Rejected and click Save, the following occurs:

■   The submission status of the MDF request remains in the Submitted state.

■   The date is removed from the Pre-Approval Date field.   However, the submitted date remains in the Submitted Date field.

■   A task record is created to track the return action of the approver.

■   A workflow rule sends the appropriate email notifications.

After the MDF request has been rejected, it becomes read-only for the owner and further updates to it are not permitted.

Approving MDF Requests

An approver can pre-approve a MDF request and allocate funds to the requested marketing activity. Currently, approval routing for MDF requests is a manual process and only one level of approval is supported.

NOTE: You can achieve multilevel approval when each approver in the approval chain updates the Approver field for the next approver in the chain.

Before you begin. The submission status of the MDF request must be set to Submitted before you can approve it.

To approve an MDF request

1   Select the MDF request that you want to approve from the All MDF Requests section on the MDF Request homepage.

For information on selecting MDF requests, see Finding Records (on page 68).

2   On the MDF Request Detail page, click the Edit button.

3   On the MDF Request Edit page, enter an amount in the Amount PreApproved field.

4   Select Approved from the Approval Status field. Then click Save.

When you change the approval status to Approved, the following occurs:

- Oracle CRM On Demand validates that the submission status value is Submitted. If the submission status is any other value, the validation fails and an appropriate error message is generated.

- Oracle CRM On Demand validates that the amount preapproved does not exceed the approval Limit set for the current approver and that the approval does not result in a negative fund balance. If the validation fails, an appropriate error message is generated.

- The Last Approved By field changes to the current user. The Current Approver field is not updated.

- The preapproval date changes to the current date on Oracle CRM On Demand.

- A workflow creates a new task to track the approval action

- A workflow sends the appropriate email notifications.

After the MDF request has been approved, it becomes read-only, and further updates to it are not permitted except when submitting a related claim or extending the expiration date.

Cancelling MDF Requests

The brand owner can cancel a market development fund (MDF) request at any point if the MDF request is no longer valid.

Before you begin. The approval status of the MDF request must be set to Approved.

To cancel an MDF request

1   Select the MDF request that you want to cancel from the All MDF Requests section on the MDF Request homepage.

    For information on selecting MDF requests, see Finding Records (on page 68).

2   On the MDF Request Detail page, click the Edit button.

3   On the MDF Request Edit page, select Cancelled from the Approval Status field. Then click Save.

    When you change the approval status to Cancelled, the following occurs:

    - Oracle CRM On Demand validates that the approval status is set to Approved.

    - A workflow rule creates a new task to track the action.

    - A workflow sends the appropriate email notifications.

After the MDF request has been cancelled, it is read-only, and further updates to it are not allowed.

Submitting Claims for MDF Requests

Partners create claims to redeem the pre-approved money that was spent on marketing activities. Claims are either created against a specific market development fund (MDF) request or can exist independently.

To submit a claim for an MDF request

1   Select the MDF request   for which you want to submit a claim from the All MDF Requests section on the MDF Request homepage.

    For information on selecting MDF requests, see Finding Records (on page 68).

2   On the MDF Request Detail page, click the Edit button.

3   On the MDF Request Edit page, enter the amount in the Total Claim Amount Requested field.

4   From the Claim Status field, select Claim Submitted. Then click Save.

    After the Claim Status field has been changed to Claim Submitted and the record has been saved the following occurs:

    ◼   The routing of the MDF request claim begins.

    ◼   A workflow rule sets the Approver field of the MDF request to the appropriate user.

    ◼   The approver is added to the team of the MDF request if the approver is not already present.

    ◼   A workflow rules sends the appropriate email notifications.

Rejecting Claims for MDF Requests

As a market development fund (MDF) claim goes through the approval chain, an approver can reject it.

Before you begin. The MDF claim must have the claim status of Claim Submitted.

To reject a claim for an MDF request

1   Select the MDF request for which you want to reject a claim from the All MDF Requests section on the MDF Request homepage.

    For information on selecting MDF requests, see Finding Records (on page 68).

2   On the MDF Request Detail page, click the Edit button.

3   On the MDF Request Edit page, select Claim Denied from the Claim Status field. Then click Save.

When you change the claim status to Claim Denied and click Save, the following occurs: a workflow rule sends the appropriate email notifications.

Approving Claims for MDF Requests

An approver can approve a market development fund (MDF) claim and offer a credit to the partner. Only one level of approval is currently supported for MDF claims.

Before you begin. The submission status of the MDF claim must be set to Claim Submitted before you can approve it.

To approve a claim for an MDF request

1 Select the MDF request for which you want to approve a claim from the All MDF Requests section on the MDF Request homepage.

For information on selecting MDF requests, see Finding Records (on page 68).

2 On the MDF Request Detail page, click the Edit button.

3 On the MDF Request Edit page, enter the amount in the Total Claim Amount Approved field.

4 Select Claim Approved from the Claim Status field. Then click Save.

When you change the approval status to Approved, the following occurs:

■ Oracle CRM On Demand validates that the total claim amount approved does not exceed the approval limit set for the approver and that the approval does not result in a negative fund balance. If the validation fails, an appropriate error message is generated.

■ The claim decision date is set to the current date on Oracle CRM On Demand.

■ A workflow rules sends the appropriate email notifications.

When the claim is approved, it debits the fund associated with the MDF request.

MDF Requests Fields

Use the MDF Request Edit page to add a market development fund (MDF) request or update the details for an existing MDF request. The MDF Request Edit page shows the complete set of fields for an MDF request.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key MDF Request Information	
ID	The MDF request identifier (ID).
Request Name	The unique name of the MDF request.
Principal Partner Account	The partner company, which is taking the lead in submitting the MDF request.
Fund	The name of the fund associated with the MDF request.
Submission Status	The status of the submission, such as Submitted, Not Submitted, or Recalled.
Due Date	The date by which you must have the MDF request approved. It is set to today's date plus 7 days by default.

Field	Description
Expiration Date	The date on which the MDF request is no longer valid.
Campaign	The name of the campaign with which the MDF request is associated.
Marketing Purpose	The marketing reason for the MDF request.
Region	The region for which the MDF request is being made.
Category	The category to which the MDF request belongs.
Partner Program	The name of the partner program with which the MDF request is associated.
MDF Request Currency	The requested currency for the MDF request.
MDF Request Detail Information	
Start Date	The date and time that the marketing activity starts. You can use the calendar controls to change this date.
End Date	The date and time that the marketing activity ends. You can use the calendar controls to change this date.
Amount Requested	The total requested amount for the marketing activity.
Amount Preapproved	The brand owner enters the total approved amount for the marketing activity.
Approval Status	The current approval status for the MDF request.
Request Date	The date and time that the MDF request was created.
Submitted Date	The date and time that the MDF request was submitted.
Pre-Approval Date	The date and time that the MDF request was preapproved.
Approver	The name of the current approver.
Last Approved By	The name of the previous approver.
Reason Code	The reason that the marketing activity was not approved. The default values are: Duplicate, Incorrect Information, Insufficient Information, and Other.
Claim Information	
Total Claim Amount Requested	The total claim amount that the partner is requesting for the marketing activity.
Total Claim Amount Approved	The total claim amount that is approved by the brand owner for the marketing activity.
Claim Status	The current status of the claim.

Field	Description
Claim Decision Date	The date on which a decision was made about the claim.
Additional Information	
Owner	The owner of the MDF request record.
	Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access.
	The value in the Owner field affects which records are included in reports that you or your managers run from Reports and Dashboard pages.
	Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Description	Additional information about the MDF request. This field has as a limit of 250 characters.
Owner Partner Account	The partner account for which the owner works. So, if the owner is a partner, then the owner account is populated with the name of the partner account to which the partner belongs.
Channel Manager	The channel manager is responsible for maintaining the relationship between the partners and the brand owner company. Channel managers serve as the primary contact for the partner.
Originating Partner Account	The name of the partner who started the MDF request.

Special Pricing Requests

Special pricing requests include the set of business processes, by which a partner asks the brand owner for a discount on a product. For example, a special pricing request might be a response to a competitive deal or a downward trend in prices. The brand owner grants the lower prices and provides credits to the partner after the sale. The specially authorised price is typically valid for an authorised product, quantity, duration, and the partner or end customer or both.

Special pricing requests include the following two phases:

Special pricing request management. The partner, or the brand owner on behalf of the partner, creates a special pricing request for a product and provides details, such as the reason for the lower price. The partner

submits the request to the brand owner for approval and when the request is approved, sells the inventory for a new lower price to the customer. After the sale, the partner can use the special pricing claim process to claim the difference between the original purchase cost and the new authorised cost.

Special pricing claim management. The partner creates a special pricing claim on approved and open special pricing requests to receive credit for a loss. Typically, Point-Of-Sale reports are submitted after the sale with special pricing claims. After the request is approved, the brand owner offers a credit to the partner for the difference between the original cost and the new authorised cost.

Special pricing requests benefit brand owners and partners in the following ways:

- Enable brand owners to support their partners in competitive situations
- Encourage partners to buy and stock products from brand owners, even if prices are likely to fall in the future

Working with the Special Pricing Request Homepage

The Special Pricing Request Homepage is the starting point for managing special pricing requests.

NOTE: Your company administrator can customise the layout of your Special Pricing Request Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Special Pricing Request

You can create a special pricing request by clicking the New button in the Recently Modified Special Pricing Request section. For more information, see Creating Records (on page 51) and Special Pricing Request Fields (on page 532).

Working with Special Pricing Request Lists

The Special Pricing Request Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for Special Pricing Requests.

Special Pricing Request List	Description
All Special Pricing Requests	This list displays all records to which you have visibility, regardless of who owns the list. It does not filter special pricing requests.
Recently Created Special Pricing Requests	Filters all special pricing requests, sorted by the created date.
Recently Modified Special Pricing Requests	Filters all special pricing requests, sorted by the modified date.
My Special Pricing Requests	Filters special pricing requests with your name in the

Special Pricing Request List	Description
	Owner field.
My Recently Created Special Pricing Requests	Filters special pricing requests with your name in the Owner field, sorted by the created date.
My Recently Modified Special Pricing Requests	Filters special pricing requests with your name in the Owner field, sorted by the modified date.
All Pending Special Pricing Requests	Filters all special pricing requests with the approval status of Pending Approval or the claim status of Claim Submitted.
My Pending Special Pricing Requests	Filters special pricing requests that you own with the approval status of Pending Approval or the claim status of Claim Submitted.
My Approved Special Pricing Requests	Filters all approved special pricing requests that you own.
Special Pricing Requests Pending My Approval	Filters special pricing requests that have the approval status of Pending Approval or the claim status of Claim Submitted, and you are the next approver.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, therefore you cannot edit or delete them.

Viewing My Recently Modified Special Pricing Requests Section

The My Recently Modified Special Pricing Requests section shows the special pricing requests that you own and were recently modified. To expand the list, click Show Full List.

Viewing My Pending Special Pricing Requests Section

The My Pending Special Pricing Requests section shows all of the special pricing requests that you own with the approval status of Pending Approval or the claim status of Claim Submitted. To expand this list, click Show Full List.

Adding Sections to Your Special Pricing Request Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Special Pricing Requests Homepage:

■ Special Pricing Request Lists

■ All Pending Special Pricing Requests

- Recently Created Special Pricing Requests

- Recently Modified Special Pricing Requests

- My Pending Special Pricing Requests

- My Approved Special Pricing Requests

- My Recently Created Special Pricing Requests

- My Recently Modified Special Pricing Requests

- Special Pricing Requests Pending My Approval

- One or more report sections (Your company administrator can make report sections, such as the Special Pricing Request Analytics Report, available on your Special Pricing Requests Homepage.)

To add sections to your Special Pricing Requests Homepage

1 On the Special Pricing Requests Homepage, click Edit Layout.

2 On the Special Pricing Requests Homepage Layout page, click the arrows to add or remove sections and to organise the sections on the page. Then click Save.

Managing Special Pricing Requests

To manage special pricing requests, perform the following tasks:

- Linking Products to Special Pricing Requests (on page 522)

- Linking Programs to Special Pricing Requests (on page 523)

- Submitting Special Pricing Requests for Approval (on page 523)

- Recalling Special Pricing Requests (on page 524)

- Returning Special Pricing Requests (on page 524)

- Rejecting Special Pricing Requests (on page 525)

- Approving Special Pricing Requests (on page 526)

- Cancelling Special Pricing Requests (on page 527)

- Submitting Claims for Special Pricing Requests (on page 527)

- Rejecting Claims for Special Pricing Requests (on page 528)

- Approving Claims for Special Pricing Requests (on page 528)

For additional procedures that are common to all records, see Working with Records (on page 46).

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)

- Updating Record Details (on page 103)

- Linking Records to Your Selected Record (on page 104)
- Working with Lists (on page 112)
- Working with Attachments (on page 147)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Linking Products to Special Pricing Requests

You can link products to special pricing requests to do the following:

- Track which products belong to the special pricing request
- Calculate the total requested and preapproved (authorised) amounts

NOTE: You click the Update Request Totals button to calculate the total requested and preapproved amounts.

Before you begin. Your company administrator must have made the Special Pricing Products related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To link a product to a special pricing request

1 Select the special pricing request (listed in the All Special Pricing Requests section on the Special Pricing Request homepage) to which you want to link a product.

   For information on selecting special pricing requests, see Finding Records (on page 68).

2 On the Special Pricing Request Detail page, scroll down to the Special Pricing Products section, and click Add.

3 In the Product field, select the product that you want to add to the special pricing request.

4 In the Special Pricing Product Detail page, update the required fields.

   For information on the fields, see Special Pricing Product Fields (on page 530).

5 Save the record.

To calculate the total requested and preapproved amounts

1 Select the special pricing request (listed in the All Special Pricing Requests section on the Special Pricing Request homepage) for which you want to calculate the total requested and preapproved amounts.

   For information on selecting special pricing requests, see Finding Records (on page 68).

2 On the Special Pricing Request Detail page, scroll down to the Special Pricing Products section.

3 Click Update Request Totals in the Special Pricing Products section.

This calculates the total requested and pre-approved amounts and updates the fields Total Amount Request and Total Amount Authorised on the special pricing request.

Linking Programs to Special Pricing Requests

You can associate a special pricing request with a specific partner program in which you participate.

To link programs to special pricing requests

1 Navigate to the Special Pricing Request Edit page.

2 In the Partner Program list, select the partner program that you want to add to the special pricing request, then click Save.

Submitting Special Pricing Requests for Approval

The partner, or the brand owner on behalf of the partner, creates a special pricing request for a price adjustment on a product and provides details, such as the reason for the lower price. The partner submits the special pricing request to the brand owner for approval. The request might or might not be granted by the brand owner. Most companies have well-defined processes to handle such requests for approval from partners. Typically, one or more employees of the brand owner evaluate the special pricing request on a variety of criteria and ultimately decide whether or not to approve the request.

Before you begin. The special pricing request must first be created. For more information on creating records, see Creating Records (on page 51). A workflow rule must be created that assigns an appropriate user as the approver for special pricing requests. For more information on creating workflow rules, see Creating Workflow Rules.

To submit special pricing requests for approval

1 Select the special pricing request (listed in the All Special Pricing Requests section on the Special Pricing Request homepage) that you want to submit for approval.

For information on selecting special pricing requests, see Finding Records (on page 68).

2 On the Special Pricing Request Detail page, click the Edit button.

3 On the Special Pricing Request Edit page, select Submitted from the Submission Status field.

4 Click Save.

After the Submission Status field has been changed to Submitted and the record has been saved, the following occurs:

■ The approval status is set to Pending Approval.

- The submitted date is automatically set to the current timestamp.

- The routing of the special pricing request begins. A workflow rule sets the special pricing request's Approver field to the appropriate user.

- The approver is added (if not already present) to the team of the special pricing request.

- A workflow rule sends the required email notifications.

The special pricing request appears on the list of records that is waiting for the approver's action and becomes read-only for the partner (owner). Further updates to the special pricing request (for example, adding or removing products, updating the requested prices, and so on) are not permitted. The partner can make changes to a submitted special pricing request only after recalling it successfully.

Recalling Special Pricing Requests

After a special pricing request has been submitted for approval and before it has been approved, you can recall the request. After you recall successfully the special pricing request, you can continue updating it and resubmit it for approval.

Before you begin. The special pricing request must have a submission status of Submitted and an approval status of Pending Approval.

To recall special pricing requests

1 Select the special pricing request (listed in the All Special Pricing Requests section on the Special Pricing Request homepage) that you want to recall.

   For information on selecting special pricing requests, see Finding Records (on page 68).

2 On the Special Pricing Request Detail page, click the Edit button.

3 On the Special Pricing Request Edit page, select Recalled from the Submission Status field.

4 Click Save.

   When you change the submission status to Recalled, the following occurs:

   - The approval status is reset as blank.

   - A workflow rule creates a new task to track the action.

   - A workflow rule sends the appropriate email notifications.

You can now update the special pricing request and resubmit it. For more information on submitting special pricing requests, see Submitting Special Pricing Requests for Approval (on page 523).

Returning Special Pricing Requests

As a special pricing request goes through the approval chain, an approver can return it to the owner to make changes. The approver can provide comments and request additional information from the owner.

Before you begin. The special pricing request must have a submission status of Submitted.

To return special pricing requests

1 Select the special pricing request that you want to return from the All Special Pricing Requests section on the Special Pricing Request homepage.

   For information on selecting special pricing requests, see Finding Records (on page 68).

2 On the Special Pricing Request Detail page, click the Edit button.

3 On the Special Pricing Request Edit page, select Returned from the Approval Status field. Then click Save.

   When you change the approval status to Returned and click Save, the following occurs:

   ■ The submission status of the special pricing request is set to Not Submitted.

   ■ The date is removed from the Authorised Date field. However, the submitted date remains in the Submitted Date field.

   ■ A workflow rule creates a task record to track the return action of the approver.

   ■ A workflow rule sends the   appropriate email notifications.

The owner of the special pricing request can update the special pricing request, and resubmit it. For more information on submitting special pricing requests, see Submitting Special Pricing Requests for Approval (on page 523).

Rejecting Special Pricing Requests

As a special pricing request goes through the approval chain, an approver can reject the special pricing request if the requested discounts cannot be granted.

Before you begin. The special pricing request must have a submission status of Submitted.

To reject special pricing requests

1 Select the special pricing request that you want to reject from the All Special Pricing Requests section on the Special Pricing Request homepage.

   For information on selecting special pricing requests, see Finding Records (on page 68).

2 On the Special Pricing Request Detail page, click the Edit button.

3 On the Special Pricing Request Edit page, select Rejected from the Approval Status field.

4 Click Save.

   When you change the approval status to Rejected and click Save, the following occurs:

   ■ The submission status of the special pricing request remains in the Submitted state.

   ■ The date is removed from the Authorised Date field. However, the submitted date remains in the Submitted Date field.

   ■ A workflow rule creates a task record to track the return action of the approver.

■ A workflow rule sends the appropriate email notifications.

After the special pricing request has been rejected, it becomes read-only for the owner and further updates to it are not permitted.

Approving Special Pricing Requests

Depending on the business processes for your company, more than one person within your company might be required to approve a special pricing request. Currently, approval routing is a manual process and only one level of approval is supported. The current approver field must be manually modified to move the special pricing request along the approval chain.

Note: Each approver in the approval chain updates the Approver field, so that multilevel approval takes place.

Before you begin. The submission status of the special pricing request must be set to Submitted before you can approve it.

To approve special pricing requests

1 Select the special pricing request that you want to approve from the All Special Pricing Requests section on the Special Pricing Request homepage.

For information on selecting special pricing requests, see Finding Records (on page 68).

2 On the Special Pricing Request Detail page, click the Edit button.

3 On the Special Pricing Request Edit page, select Approved from the Approval Status field.

4 Click Save.

When you change the approval status to Approved, the following occurs:

■ Oracle CRM On Demand validates that the submission status value is set to Submitted. If the submission status is any other value, the validation fails, and an appropriate error message is generated.

■ Oracle CRM On Demand validates that the total amount authorised does not exceed the approval limit set for the current approver and that the approval does not result in a negative fund balance. If the validation fails, an appropriate error message is generated.

■ Oracle CRM On Demand validates that the Total Amount Authorised is equal to the sum of authorised amounts of all special pricing products. If it is not equal, validation fails and an appropriate error message is issued.

■ The Last Approved By field changes to the current user. The current Approver field is not updated.

■ The authorised date changes to the current date on Oracle CRM On Demand.

■ A workflow rule creates a new task to track the approval action.

■ A workflow rule sends the appropriate email notifications

After the special pricing request has been approved, it becomes read-only, and further updates to it are not permitted except when submitting a related claim or extending the expiration date.

Cancelling Special Pricing Requests

The brand owner can cancel a special pricing request at any point, if the request is no longer valid.

Before you begin. The special pricing request must have an approval status of Approved.

To cancel a special pricing request

1 Select the special pricing request that you want to cancel from the All Special Pricing Requests section on the Special Pricing Request homepage.

   For information on selecting special pricing requests, see Finding Records (on page 68).

2 On the Special Pricing Request Detail page, click the Edit button.

3 On the Special Pricing Request Edit page, select Cancelled from the Approval Status field. Then click Save.

   When you change the approval status to Cancelled, the following occurs:

   ■ Oracle CRM On Demand validates that the approval status value is Approved.

   ■ A workflow rule creates a new task to track the action.

   ■ A workflow rule sends the appropriate email notifications.

After the special pricing request has been cancelled, it becomes read-only and further updates to it are not permitted.

Submitting Claims for Special Pricing Requests

Partners use the special-pricing claim process to claim the difference between the original purchase cost and the new approved cost that is authorised on the special pricing request. Typically, one or more employees of the brand owner evaluate the claim using a variety of criteria and decide whether or not to approve the claim.

To submit claims for special pricing requests

1 Select the special pricing request for which you want to submit a claim from the All Special Pricing Requests section on the Special Pricing Request homepage.

   For information on selecting special pricing requests, see Finding Records (on page 68).

2 On the Special Pricing Request Detail page, click the Edit button.

3 On the Special Pricing Request Edit page, enter an amount in the Total Claim Amount Req field.

4 Select Claim Submitted from the Claim Status field. Then click Save.

   After the Claim Status field has been changed to Submitted and the record has been saved the following occurs:

- The routing of the special pricing request claim begins. A workflow rule sets the Approver field of the special pricing request to the appropriate user.

- The approver is added to the team of the special pricing request, if not already present.

- A workflow rule sends the appropriate email notifications.

Rejecting Claims for Special Pricing Requests

As a special pricing claim goes through the approval chain, an approver can reject it.

Before you begin. The special pricing request claim must have a claim status of Submitted.

To reject a claim for a special pricing request

1 Select the special pricing request for which you want to reject a claim from the All Special Pricing Requests section on the Special Pricing Request homepage.

   For information on selecting special pricing requests, see Finding Records (on page 68).

2 On the Special Pricing Request Detail page, click the Edit button.

3 On the Special Pricing Request Edit page, select Claim Denied from the Claim Status field.

4 Click Save.

   When you change the claim status to Claim Denied and click Save, the following occurs: a workflow rule sends the appropriate email notifications.

Approving Claims for Special Pricing Requests

An approver can approve a special pricing claim and offer a credit to the partner. Only one level of approval is currently supported for special pricing claims.

Before you begin. The claim status of the special pricing claim must be set to Claim Submitted before you can approve it.

To approve claims for special pricing requests

1 Select the special pricing request for which you want to approve a claim from the All Special Pricing Requests section on the Special Pricing Request homepage.

   For information on selecting special pricing requests, see Finding Records (on page 68).

2 On the Special Pricing Request Detail page, click the Edit button.

3 On the Special Pricing Request Edit page, enter an amount in the Total Claim Amount Approved field.

4 Select Claim Approved from the Claim Status field. Then click Save.

When you change the claim status to Claim Approved, the following occurs:

■ Oracle CRM On Demand validates that the total claim amount approved does not exceed the approval limit set for the approver and that the approval does not result in a negative fund balance. If the validation fails, an appropriate error message is issued.

■ The claim decision date changes to the current date on Oracle CRM On Demand.

■ A workflow rule sends the appropriate email notifications.

Managing Special Pricing Products as Related Items

To manage special pricing products as related items, perform the following tasks :

■ Creating Special Pricing Products as Related Items (on page 529)

■ Special Pricing Product Fields (on page 530)

For additional procedures that are common to all records, see Working with Records (on page 46).

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Creating Special Pricing Products as Related Items

You can create a special pricing product as a related item of a special pricing request in order to indicate the requested cost (or other information) for a specific product. From Oracle CRM On Demand, you create a special pricing product as a related item by entering information in a form. You can access this form from the special pricing request details page.

NOTE: Before you can create special pricing products, the Special Pricing Products area must be added to the Special Pricing Request details page as a related item. For more information on adding related items, see Customising Related Item Layouts.

To create special pricing products as a related items

1 On the Special Pricing Request Detail page, scroll down to the Special Pricing Products section, and click Add.

2 In the Product Name field, select a product.

3 Update the rest of the fields on the Special Pricing Request Product Edit page, as needed. Then click Save.

For information on each field, see Special Pricing Product Fields (on page 530).

Special Pricing Product Fields

Use the Special Pricing Product Edit page to create a new special pricing product. The Special Pricing Product Edit page shows the complete set of available fields for a special pricing product.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. Therefore, the information you see on the screen might differ from the information in this table.

The following table provides additional information regarding the fields on the Special Pricing Product Edit pages.

Field	Description
Key Product Information	
Product	The name of the product for the special price request. If the special pricing request is related to an opportunity, then only the products that exist for that opportunity can be selected. If not, then all products are listed.
Product: Product Category	The category of the product carried over with the product definition. Read-only.
Quantity	The expected quantity of products that will be sold under this special pricing request.
Currency	The currency for the special pricing product.
Product: Part #	The part number carried over with the product definition. This field is read-only.
Product: Type	The type of product carried over with the product definition. This field is read-only.
Product: Status	The status carried over with the product definition. This field is read-only.
MSRP	The manufacturer's suggested retail price (MSRP) in the currency used. This field is read-only for the partner.
	If an end customer has been defined for the special pricing request and a price list has been associated with that end customer, then Oracle CRM On Demand populates the MSRP field upon Special Pricing Product record save, based on this price list. The price list of the special pricing request is automatically populated with the price list value added to the account or end customer record that is associated with the Special Pricing Request record. The following conditions

Field	Description
	should also be met: ■ The Price List associated with the End Customer is of type 'MSRP' ■ The status of this Price List is 'Published' ■ The Product exists on this Price List ■ The Start Date of the Special Pricing Request falls between the Effective From/To dates of the Price List (and the Price List Line Item) If a price list has not been associated with the end customer, then the price list on the Special Pricing Request header will remain empty.
Special Pricing Request Detail Information	
Purchase Cost	The price that the partner originally paid for the product. Oracle CRM On Demand populates this field upon the Special Pricing Product record save from the price list associated with the owner partner account. For purchase cost to be populated in the Special Pricing Product record, the owner of the Special Pricing Request should be a Partner User. The following conditions should also be met: ■ The Price List associated with the Owner Partner Account is of type 'DIST COST' ■ The status of this Price List is 'Published' ■ The Product exists on this Price List ■ The Start Date of the Special Pricing Request falls between the Effective From/To dates of the Price List (and the Price List Line Item) You can edit the Purchase Cost field and change the default value.
Requested Cost	The reduced price that the partner requested for the special pricing request.
Requested Resale Cost	The resale price at which the partner wants to sell the product.
Authorised Cost	The partner's price that was negotiated for the special pricing request. This field is read-only for the partner.
Suggested Resale Price	The resale price suggested by the brand owner. This field is read-only for the partner.
Requested Amount	Calculates the discount requested. Oracle CRM On Demand calculates the amount.
Requested Discount Percent	Calculates the discount percentage requested. Oracle CRM On Demand calculates the discount percentage.
Authorised Amount	Calculates the discount authorised. Oracle CRM On Demand calculates the discount authorised.

Field	Description
Authorised Discount Percent	Calculates the discount percentage authorised. Oracle CRM On Demand calculates the discount percentage authorised.
Special Pricing Justification	
Competitor Name	The name of the competitor for the special pricing request.
Competitor Product	The name of the competitor's product.
Competitor Product Price	The price of the competitor's product.
Competitor Partner	The name of the competing partner.
Other Competitive Information	Any other information regarding competitive product offerings, special price justification, and so on.
Additional Information	
Description	Additional information about this list item. This field has a limit of 16,350 characters.

Special Pricing Request Fields

Use the Special Pricing Request Edit page to add a special pricing request or update details for an existing special pricing request. The Special Pricing Request Edit page shows the complete set of fields for a special pricing request.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names of record types, fields, and options in lists. So, the information you see might differ from the standard information, described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Special Pricing Request Information	
ID	The special pricing request identifier (ID).
Request Name	The name of the special pricing request.
Principal Partner Account	The partner company that is leading the effort on the special pricing request.
Submission Status	The status of the submission, such as Not Submitted, Submitted, Recalled.
Due Date	The date by which you must have the special pricing request approved. This field displays the date as one week from the current day by default.

Field	Description
Fund	The name of the fund associated with the special pricing request.
Opportunity	The opportunity to which the special pricing request is related.
End Customer	The end customer for the special pricing request. If the request is associated with an opportunity, then you can only select Opportunity Account.
Originating Partner Account	The partner who originated the special pricing request.
Deal Registration	The deal registration for which the request is related.
Partner Program	The partner program with which the special pricing request is associated.
Currency	The currency to which the price is converted. You can select another currency to convert the price to another currency, if your company administrator sets up that feature.
Special Pricing Request Detail Information	
Start Date	The date and time from when the special pricing starts. You can use the calendar controls to change this date.
End Date	The date and time after which the special pricing is no longer effective. You can use the calendar controls to change this date.
Total Amount Requested	Oracle CRM On Demand generates the total for the requested amount of each special pricing product.
Total Amount Authorised	Oracle CRM On Demand generates the total for the authorised amount of each special pricing product.
Request Date	The date and time when the special pricing request was created.
Submitted Date	The date and time that the special pricing request was submitted.
Authorised Date	The date and time that the special pricing request was approved.
Approver	The name of the current approver.
Approval Status	The current approval status of the special pricing request, such as Pending Approval, Approved, Returned, Rejected, Expired, or Cancelled.
Last Approved By	The name of the person who most recently approved the special pricing request.
Reason Code	Indicates the reason why a special pricing request was returned or rejected.

Field	Description
Claim Information	
Total Claim Amount Req.	The total claim amount that is being requested by the partner.
Total Claim Amount Approved	The total claim amount that is being approved by the brand owner.
Claim Status	The current status of the claim, such as In Progress, Claim Submitted, Claim Denied, and Claim Approved.
Claim Decision Date	The date on which a decision was made for the claim.
Additional Information	
Owner	The owner of the special pricing request record.
	Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access.
	The value in the Owner field affects which records are included in reports that you or your managers run from Reports and Dashboard pages.
	Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Modified	The name of the person who creates or updates the record followed by the date and time it was created or updated. Oracle CRM On Demand generates this value.
Description	Additional information about the special pricing request. This field has as a limit of 250 characters.
Owner Partner Account	The partner account for which the owner works. So, if the owner is a partner, then the owner account is populated with the name of the partner account to which the partner belongs.
Channel Manager	The channel manager is responsible for maintaining the relationship between the partners and the brand owner company. Channel managers serve as the primary contact for the partner.

Funds

Use the Funds pages to create, update and track funds.

A *fund* is typically a sum of money or a set of other resources that are set aside for a specific purpose. Funds can be market development funds, cooperative funds, trade promotion funds, and so on. From the Funds pages, you can manage a set of activities that require preapproval and process claims for marketing funds.

When you create a fund record, you become the owner of the fund or the fund manager. Typically, fund owners can update or delete fund records, add other users as fund participants, create credit and debit entries, and add attachments and notes to a fund. However, your company administrator can adjust your access levels to restrict or expand your access to fund records.

Fund participants can view the fund record, but they cannot edit it. They can also submit preapproval requests and claim requests against the funds in which they are listed as participants. Fund managers can view and edit all fund requests against the funds that they own and can approve or reject these fund requests.

NOTE: You cannot edit fund requests in which the Status field is set to Claim Approved.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include working with funds, the Funds tab might be excluded from your set-up.

Working with the Funds Homepage

The Funds Homepage is the starting point for managing funds and fund requests.

NOTE: Your company administrator can customise the layout of your Funds Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Fund or a Fund Request

You can create a fund or a fund request by either clicking Fund or Fund Request in the Create section at the left of the Fund Homepage. For more information, see Creating Records (on page 51) and Fund Fields (on page 545).

Working with Fund Lists or Fund Request Lists

The Fund Lists and Fund Request List sections show a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard fund lists that are available by default.

Fund List	Filters
All Funds	All the funds that you and your subordinates own
All Active Funds	All the funds that you and your subordinates own with a Status of Active

Fund List	Filters
My Funds	Funds with your name in the Owner field
My Active Funds	Funds with your name in the Owner field and with a Status of Active

The following table describes the standard fund request lists that are available by default.

Fund Request List	Filters
All Fund Requests	All the fund requests that you and your subordinates own
My Fund Requests	Fund requests with your name in the Owner field
My Pending Fund Requests	All fund requests that you own with the status of Pre-Approval Submitted.
Pending Fund Requests	All fund requests with the status of Pre-Approval Submitted.
My Approved Fund Requests	All fund requests that you own with the status of Pre-Approved.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Your Pending Fund Requests

To view your pending fund requests, look in the My Pending Fund Requests section, which shows the following information: Fund Request Name, Fund, Pre-Approved Req, Granted, Approved, Request Date, Due Date, and Status.

Your pending fund requests are the requests with the status of Pre-Approval Submitted.

To expand the list of recently modified funds, click Show Full List.

Viewing Open Activities for Fund Requests

To view the open activities for fund requests, look in the Fund Request - Open Activities section, which shows the following information: Due Date, Priority, Activity, Subject, and Fund Request.

This information provides the list of the open activities that are linked to your fund requests. The Priority field shows the priority for tasks that you or your manager specified, such as 1-High, 2-Medium, or 3-Low. The task priority is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority.

NOTE: If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values.

To expand the list of recently modified fund requests, click Show Full List.

Adding Sections to Your Funds Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Funds Homepage:

■ Pending Fund Requests

■ One or more report sections (your company administrator can make report sections available on your Funds Homepage)

To add sections to your Funds Homepage

1 On the Funds Homepage, click Edit Layout.

2 On the Funds Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Related Topics

See the following topics for related Fund information:

■ Funds (on page 535)

■ Managing Funds (on page 537)

■ Fund Fields (on page 545)

Managing Funds

To manage funds, do the following tasks:

■ Adding Fund Participants (on page 539)

- Adding Credits to Funds (on page 539)

- Processing Requests for Funds (on page 540)

- Processing Claims (on page 543)

- Applying Debits Against Funds (on page 544)

- Reviewing Fund Activity (on page 544)

NOTE: The funds feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

NOTE: You can update a fund record if you are its owner. If you are a fund participant, then you can create and update fund requests.

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)

- Updating Record Details (on page 103)

- Linking Records to Your Selected Record (on page 104)

- Working with Lists (on page 112)

- Transferring Ownership of Records (on page 133)

- Adding Notes (on page 143)

- Attaching Files and URLs to Records (on page 150)

- Deleting and Restoring Records (on page 161)

- Viewing Audit Trails for Records (on page 164)

- Customising the Audit Trail

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related Fund information and topics of interest:

- Working with the Funds Homepage (on page 535)

- Fund Fields (on page 545)

- Reports (on page 907)

- Tracking Assets (on page 280)

Adding Fund Participants

When you create a fund record, you become the owner by default. You then need to add fund participants. Adding someone as a fund participant allows that person to view the fund record and submit fund requests against the fund.

Before you begin. For users to appear on the list of eligible fund participants, they must first be set up as active users of Oracle CRM On Demand High Tech Edition.

To add a fund participant

1 Select the fund.

   For instructions on selecting funds, see Finding Records (on page 68).

2 On the Fund Detail page, scroll down to the Fund Participants section and click Add Participant.

   NOTE: You might have to add the Fund Participants section to your layout. For information on changing the layout, see Changing Your Detail Page Layout (on page 855).

3 On the Add Fund Participant page, click the Lookup icon, and select the user.

   The user list consists of all people using Oracle CRM On Demand High Tech Edition.

4 Save the record.

Adding Credits to Funds

To make funds available, add credit to the fund.

To add credit to a fund

1 Select the fund.

   For instructions on selecting funds, see Finding Records (on page 68).

2 On the Fund Detail page, scroll down to the Fund Credits section and click New in the title bar.

   NOTE: You might have to add the Fund Credits section to your layout. For information on changing the layout, see Changing Your Detail Page Layout (on page 855).

3 Enter the information as described in the following table, and then save the record.

Field	Description
Fund	The name of the fund, which is set to the current fund by default. (View-only.)
Credit Name	The name of this credit record. This field has a limit of 30 characters. (Required field.)

Field	Description
Amount	The amount of the credit that you are applying to the fund, for example, $500.
Description	The description of this fund credit.
Expiration Date	The date after which the credit will no longer be valid (MM/DD/YYYY). The date is provided for informational purposes. Use the Calendar icon to select the date.

Processing Requests for Funds

When you want to start using some of the fund amount, create a fund request and submit it to the fund manager for approval. To track the stage of the fund request, you and your fund manager update the Status field.

To submit a request for pre-approval

1 Select the fund.

For instructions on selecting funds, see Finding Records (on page 68).

2 On the Fund Detail page, scroll down to the Fund Requests section and click New.

NOTE: You might have to add the Fund Requests section to your layout. For more information, see Changing Your Detail Page Layout (on page 855).

3 On the Fund Request Edit page, enter the required information.

The following table describes field information for fund requests. Your administrator can add, rename or delete fields, so the fields you see might differ from those in this table.

Field	Description
Key Fund Request Information	
Request ID*	The identifier for the fund request. Oracle CRM On Demand generates the Request ID. (Required field.)
Fund Request Name	The name of the Fund Request. Limit of 50 characters. (Required field.)
Type	Indicates the fund type. This is a customisable field, which your company administrator can alter. (Required field.) Two types of funds are provided: ■ **MDFs (market development funds).** These funds are used by the company's sales or marketing department to help a partner, reseller, or distributor to sell and market your products.

Field	Description
	◼ **SPFs (special pricing authorisation).** These funds are used by a company to support special pricing requests. These special pricing requests are fund requests that a partner submits to obtain a special price on a product or group of products. This price is usually requested so the partner can stay competitive or make a specific margin.
Fund	The name of the linked Fund. (Required field.)
Status	The current status of the Fund Request. Required field. (Required field.) The following are the default options: Claim Approved, Claim Denied, Claim Submitted, In Progress, Pre-Approval Denied, Pre-Approval Submitted, or Pre-Approved. Fund participants can change the status to: In Progress, Pre-Approval Submitted or Claim Submitted.
Due Date	The date by which you must have the fund request approved. (Required field.)
Opportunity	The opportunity to which the fund is related.
Opportunity Account	The account to which the related opportunity belongs.
Campaign	Use to link a campaign with a fund.
Marketing Purpose	Default options are Partner Incentive, Joint Marketing, Competitive Positioning, New Product Launch or Customer Retention.
Region	Default options are Africa, Asia/Pacific, Europe, Latin America, Middle East, None, North America, Northern Europe, Other, South America, Southern Europe or Worldwide.
Category	Default options are Advertising, Branding, Customer Event, Direct Mailing, Displays, Executive Event, Joint Advertising, Other, Promotion, Samples, Seminar, Spiff, Trade Show or Training.
Partner Program	The partner program for which the fund request is being made.
Fund Request Detail Information	
Pre-Approval Req.	The amount of funds that you need to execute your tasks.
Granted	Used by the Fund Manager, this field contains the amount granted to the participant, based on the amount requested in the Pre-Approval Req. field.
Claim Req.	After the task is completed, the participant claims the amount spent to complete the task using this field.
Approved	Used by the Fund Manager, this field contains the amount approved based on the amount claimed.
Request Date	Defaults to today's date.

Field	Description
Pre-Approval Date	Used by the Fund Manager, this field contains the date on which the Fund Manager approved the fund request amount.
Claim Decision Date	Used by the Fund Manager, this field contains the date on which the Fund Manager approved the fund claim amount.
Begin Date	The beginning of the period for which the brand owner has approved the fund request.
End Date	The end of the period for which the brand owner has approved the fund request. After this date, the fund request is no longer valid.
Fund Request Currency	The currency in which the fund was requested.
Additional Information	
Owner	Generally, the owner can update the record, transfer the record to another owner or delete the record. However, access levels can be adjusted to restrict or expand a user's access. This value affects the records that are included in reports that you or your managers run (from Reports and Dashboard pages).
Modified	Name of the person who creates or updates the record, followed by the date and time when the record is created or updated. System-generated.
Owner Account	This is the partner account for which the owner works. So, if the owner is a partner, then the owner account is populated with the name of the partner account to which the partner belongs.
Channel Manager	The channel manager is responsible for maintaining the relationship between the partners and the brand owner company. Channel managers serve as the primary contact for the partner.
Description	This field has as a limit of 250 characters.

1 For Status, select Pre-Approval Submitted.

2 Save the record.

The fund request record appears in the Pending Fund Requests section on the fund manager's Funds Homepage.

To pre-approve a fund request

1 On the Funds Homepage, select the fund request from the Pending Fund Requests section.

2 On the Fund Request Detail page, click the Edit button.

3 On the Fund Request Edit page, perform the following:

    a   Enter the appropriate date in the Pre-Approval Date field.

    b   Enter the amount that you approve in the Granted field.

    c   Update the Status field to Pre-Approved.

4   Save the record.

Processing Claims

Once the Fund Manager approves the fund request and you complete the task for which you requested the fund, you are ready to submit a claim. After you submit the claim, the Fund Manager can review and approve it.

To submit a claim

1   Select a fund request from a Fund Request List for which you want to submit a claim or select a preapproved fund request (listed in the Pending Fund Request section on the Funds homepage).

    For instructions on selecting fund requests, see Finding Records (on page 68).

2   On the Fund Request Detail page, click the Edit button.

3   On the Fund Request Edit page, do the following:

    a   Enter the amount you are claiming in the Claim Req. field.

    b   Select Claim Submitted from the Status field.

    c   Enter an appropriate date in the Due Date field.

4   Save the record.

To approve a claim

1   Select the fund request (listed in the Pending Fund Request section on the Funds homepage) for which you want to approve a claim.

    For instructions on selecting fund requests, see Finding Records (on page 68).

2   On the Fund Request Detail page, review the amount being claimed in the Claim Req. field, and then click the Edit button.

3   On the Fund Request Edit page, do the following:

    a   Enter the amount you approve in the Approved field.

    b   Enter the date in the Claim Decision Date field.

    c   Select Claim Approved from the Status field.

    NOTE: To approve funds, you must have the Fund Approval Limit set to a sufficient value on your user record. Contact your company administrator if the approval limit is insufficient. In addition, Oracle CRM On Demand does not allow you to approve a fund request that results in a negative fund balance unless the Allow Negative Balance check box is selected on the Fund Detail page.

4   Save the record.

    After a claim is approved, it appears in the Fund Debits section of the fund record.

    NOTE: After a claim is approved, you can no longer edit the fund request.

Applying Debits Against Funds

To deduct an amount from the fund, create a debit record.

To apply a debit against a fund

1   Select the fund.

    For instructions on selecting funds, see Finding Records (on page 68).

2   On the Fund Detail page, scroll down to the Fund Debits section and click New in the title bar to create a debit entry.

3   On the Fund Debit Edit page, enter the required information.

    The Fund Request Name has a limit of 50 characters.

Reviewing Fund Activity

You can review the fund activity for records that you manage, or if you are the fund administrator at your company, for all your company's funds and fund requests. This allows you to monitor and track fund activity.

To review a fund's activity

1   Select the fund.

    For instructions on selecting funds, see Finding Records (on page 68).

2   On the Fund Detail page, scroll down to the Audit Trail section.

    The list traces each activity concerning the fund, including transactions, dates and people involved.

NOTE: You might want to add the Audit Trail section to your layout. For more information, see Changing Your Detail Page Layout (on page 855).

Fund Fields

Use the Fund Edit page to add a fund or update details for an existing fund. The Fund Edit page shows the complete set of fields for a fund record.

NOTE: Company administrators can customise your application in a variety of ways, such as changing names for record types, fields and options in picklists. Therefore, the information that you see might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Fund Information	
Fund ID	The fund identifier. System-generated. (Required field.)
Fund Name	The name of the fund. Limit of 50 characters. (Required field.)
Start Date End Date	Time period for which the fund is valid.
Status	Default options are Active, Closed, In Progress or Suspended.
Type	Indicates the fund type. The options for the fund type are: ■ **MDF (Market Development Funds).** MDF are monetary funds given by a manufacturer's sales or marketing department to help a partner, reseller, or distributor to sell its products, or to market the manufacturer's brand. ■ **SPA (Special Pricing Authorisation).** SPA allows partners to request a special price for a product or group of products that is being sold.
Partner	Accounts must have the Partner field checked for them to appear in this selection list.
Allow Negative Balance	Selecting this check box enables the fund to carry a negative balance. For example, if the fund's balance is $500, then a fund request of $600 can be approved. If this check box is not selected, Oracle CRM On Demand displays a message indicating that negative balances are not allowed if the fund approver tries to approve the same $600 fund request. (Required field.) This check box is selected by default.
Target Amount	The total sterling amount targeted for the fund. (Required field.)
Total Credits	Read-only field. The sum of all the fund credits that are created in the Fund Credits section.

Field	Description
Total Debits	Read-only field. This is the sum of all the fund debits that are created in the Fund Debits section. Once a Fund Claim is approved, a debit record is automatically created in the Fund Debit section.
Balance	Read-only field. Value is: (Total Credits - Total Debits).
Total Pre-Approved	Read-only field. The sum of all the Fund Requests approved for a given Fund. Once the Fund Manager approves a Fund Request, the value is reflected in this field.
Balance after Pre-Approvals	Read-only field. Value is: (Total Credits - Total Pre-Approved).
Fund Currency	The currency of the fund, for example, U.S. dollars or euro. Use the Currency selector icon to choose the currency of the fund.
Additional Information	
Owner	The owner of the fund record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. The value in the Owner field affects which records are included in reports that you or your managers run from Reports and Dashboard pages.
Description	Limit of 250 characters.

Related Information

See the following topics for related Fund information:

- Funds (on page 535)
- Working with the Funds Homepage (on page 535)
- Managing Funds (on page 537)

Courses

A *course* is a structured educational program offered with the primary aim of imparting a specific set of skills to an individual. Many companies, especially those that deal with complex products or services, require their partners and resellers to be adequately trained in and familiar with what they sell. Thus, courses become a mechanism to disseminate knowledge and information about a company's products and services. Typically, courses focus on a specific product or product family. However, sometimes they might also deal with generic concepts or principles. Courses can be either theoretical or practical (for example, hands-on training, laboratory based, and so on) or a blend of both.

In Oracle CRM On Demand, a course can be associated with a specific product or a set of products. Likewise, a course can also be associated with a single product category, several product categories, or none at all. With the standard configuration of Oracle CRM On Demand, you can also capture several basic attributes of a course, such as the duration, fee, start and end dates, dependencies on other courses, and so on.

Courses might be offered either by the company itself, outsourced to designated training service providers, or both. With Oracle CRM On Demand, you can define the list of third-party vendors offering the course and publish the list to partners. Once a course is published, partner employees can enrol contacts into the course.

Working with the Course Homepage

The Course Homepage is the starting point for managing courses.

NOTE: Your company administrator can customise the layout of your Course Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Course

You can create a course by clicking the New button in the Recently Modified Courses section. For more information on creating courses, see Creating Records (on page 51) and Course Fields (on page 553).

Working with Course Lists

The Course Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for courses.

Course List	Description
All Courses	Lists all courses to which you have visibility, regardless of the owner.
Recently Created Courses	All courses that were created in the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently created course appears first in the list.
Recently Modified Courses	All courses that have been modified within the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently modified course appears first in the list.
Recently Introduced Courses	All courses that became available within the last 90 days to which you have visibility. The default sort order is reverse chronological, so that the most recently introduced course appears first in the list.

Course List	Description
Retiring Courses	All courses that are scheduled to be retired within the next 90 days to which you have visibility. The default sort order is chronological, so the course that is about to be retired first appears first in the list.
My Courses	All courses that are owned by you.
My Recently Created Courses	All courses created within the last 30 days that are owned by you.
My Recently Modified Courses	All courses updated within the last 30 days that are owned by you.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Courses

The Recently Modified Courses section shows the courses that were modified most recently.

To expand the list, click the Show Full List link.

Adding Sections to Your Course Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Course Homepage:

- All Courses
- Recently Created Courses
- Recently Modified Courses
- Recently Introduced Courses
- Retiring Courses
- My Courses
- My Recently Created Courses
- My Recently Modified Courses

To add sections to your Course Homepage

1 On the Course Homepage, click Edit Layout.

2 On the Course Homepage Layout page, click the arrows to add or remove sections and to organise the sections on the page.

3 Click Save.

Managing Courses

To manage courses, do the following tasks:

■ Associating Certifications with Products, Product Categories, and Solutions (on page 569)

■ Associating Courses with Exams and Certifications (on page 550)

■ Relating Courses to Other Courses (on page 550)

■ Making Courses Visible to Partners (on page 551)

■ Enrolling in Courses (on page 551)

■ Updating the Course Enrolment Record (on page 552)

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

■ Adding Notes (on page 143)

■ Working with Attachments (on page 147)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Associating Courses with Products, Product Categories, and Solutions

You can associate courses with one or more products, product categories, and solutions. If the course is appropriate for only one product or only one product category, then select the appropriate value from the Primary Product or Primary Product Category field, respectively. However, if the course is applicable to a solution, more than one product, or more than one product category, follow the steps listed below.

Before you begin.

Your company administrator must have made the Course Products, Course Product Categories, or Course Solutions related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To associate courses with products, product categories, or solutions

1   In the Course Products, Course Product Categories, or Course Solutions section of the Course Detail page, click Add.

2   On the edit page, specify the product (or, product category) and click Save.

3   Repeat the above steps as many times as necessary to define all the relationships.

NOTE: Follow the above steps to relate a course to solutions, regardless of whether the course is related to one solution or many solutions.

Associating Courses with Exams and Certifications

A course usually culminates in one or more exams. If you successfully pass the exam or series of exams, you are awarded a certificate. You can associate a course with exams, certifications, or both.

Before you begin.

Your company administrator must have made the Course Exams or Certification Courses related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To associate courses with exams and certifications

1   In the Course Exams or Certification Courses section of the Course Detail page, Click Add.

2   In the edit page, specify the exam or certification as appropriate.

3   Click Save.

4   Repeat the above steps to add additional exam or certificate relationships.

Relating Courses to Other Courses

In Oracle CRM On Demand you can relate a course to other courses. One course can be a prerequisite to one course, a follow-up to another course, and a replacement for another, possibly retired, course.

This information is captured only for informational purposes and is mainly intended to help you present your partners with a holistic view of the available courses and their inter-dependencies. Oracle CRM On Demand will not enforce the relationship requirements specified in this section when a contact enrols into a course. Thus, for example, a completed enrolment in course A might be defined as a pre-requisite for getting enrolled

into course B; however, this pre-requisite will not be enforced by Oracle CRM On Demand and it will allow the contact to enrol into course B even though she may not have enrolled at all into course A.

NOTE: To ensure that a course cannot be related to itself, the Related Course field cannot be the same as the course on the parent page.

Before you begin.

Your company administrator must have made the Related Courses related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To relate a course to another course

1   On the Course List page, click the name of the course that you want to relate to another course.

2   In the Related Courses section of the Course Detail page, click Add.

3   On the Related Courses Edit page, select the related course and type of relationship. Then click Save.

Making Courses Visible to Partners

Courses are not automatically visible to partners. You can make the course visible by adding partner employees to a team, and associating that team with the course record.

Before you begin.

Your company administrator must have made the Course Team related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To make courses visible to partners

1   In the Course Team section of the Course Details page, click Add Users.

2   On the Course Team Edit page, specify the user name, team role and record access for each partner employee to whom you want the course to be visible.

   NOTE: Oracle recommends that you grant Read-only access to the partner employee team members.

3   Click Save.

Enrolling in Courses

You can use Oracle CRM On Demand to enrol in a course to improve your skill set with a specific product or a set of products.

Before you begin.

Your company administrator must have made the Course Enrolments related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To enrol in a course

1 On the Course List page, click the name of the course in which you want to enrol.

2 In the Course Enrolments section of the Course Detail page, click Enroll.

3 On the Course Enrolment Edit page, select the course and the candidate you want to enrol. Then click Save.

NOTE: Subject to some constraints, Oracle CRM On Demand supports multiple enrolments by the same contact into the same course. A contact might want to enrol on the same course more than one time for several reasons, for example, to complete an incomplete enrolment, as a refresher, and so on. Oracle CRM On Demand allows a contact to enrol repeatedly into the same course as long as the enrolment dates or the owner of the record are different.

Updating the Course Enrolment Record

Only users with the appropriate access rights can update the course enrolment record. By default, only brand-owner roles, such as Channel Manager, can update the Status field on the enrolment record. Brand-owner roles and partner roles can update all other fields.

Your company administrator can modify the default access right settings, as required.

Before you begin.

Your company administrator must have made the Course Enrolments related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To update a course enrolment record:

1 In the Course Enrolments section of the Course details page, click the Edit link for the enrolment record you want to modify.

2 Modify the fields as appropriate.

3 Click Save.

NOTE: The default permissible values for the enrolment status field are Enrolled, Completed, and Incomplete. However, this list is completely configurable and you can modify it to suit your business requirements.

Course Fields

Use the Course Edit page to add a course or update details for an existing course. The Course Edit page shows the complete set of fields for a course.

TIP: You can also edit courses on the Course List page and the Course Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Information Section	
Name	The name of the course. This field is case sensitive, make sure you follow the naming conventions that your company has set up for abbreviations, capitalisation, and so on, to avoid duplicate courses. This field is required.
Type	The course type that you want to use for this course.
Status	The status of the course, such as Planned or Available. Your administrator can modify the possible values for status, you may see a set of values different from those mentioned here. This field is required.
Available From	The date on which the course is introduced. This field is useful if you plan to introduce a course over the next few months but want to spread awareness about it to your partner community before the introduction. This field, if specified, decides whether or not this course will be displayed on the Recently Introduced Courses list on the course home page.
Course ID	Internal identifier for the course. Within a company, this identifier is typically unique; however, Oracle CRM On Demand does not enforce uniqueness.
Primary Product Category	The name of the primary product category on which this course focuses. Use this field only if the course is focused on a single product category. If the course is equally appropriate for several product categories, leave this field blank and use the Course Product Categories related item section instead.
Primary Product	The main product on which the course focuses. If the course is for more than one product, use the Product related-item to capture the list of products. Use this field only if the course is focused on a single product. If the course is equally appropriate for several products, leave this field blank and use the Course Products related item section instead.
Available Till	The date after which the course will no longer be offered. Use this field to spread awareness among the partner community that the course is set to be de-commissioned soon. This field, if specified, decides whether or not this course will be displayed on the Retiring Courses list on the course home page.
Course Details Section	

Field	Description
Duration (Hours)	The duration of the course.
Course Length (Days)	The calendar length of the course. Courses of longer duration (typically more than 8 hours) are usually offered over several days.
Format	Indicates the delivery format for the course.
Medium	Indicates the delivery medium for the course.
External Unique ID	The unique identifier of the course in an external system. This ID is required when you import data from an external system and must know whether an incoming course has been previously imported.
Website	The URL of a page that contains additional information about the course. The Website field is useful if the course information is stored and maintained in some application other than Oracle CRM On Demand.
Currency	The currency used for the fee.
Course Fee	The fee charged for taking the course.
Payment Options	The method by which you will pay for the course, such as credit card or check. This is a single-value field. Therefore, if multiple payment options are allowed, define them as a value in the drop-down list. For example, "Check or Credit", "Cash or Credit", and so on.
Contact Information Section	
Contact	The main point of contact for the course. Use this field only if the point of contact already exists as a contact in Oracle CRM On Demand.
Contact: First Name	The first name of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
Contact: Last Name	The last name of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
Contact: Company	The company of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
Contact: Email	The email address of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
First Name	The first name of the point of contact for the course. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Last Name	The last name of the point of contact for the course. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.

Field	Description
Company	The company of the point of contact for the course. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Email	The email address of the point of contact for the course. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Phone	The phone number of the point of contact for the course. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Additional Information	
Owner	The owner of the course record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Description	Additional information about the course. This field has a limit of 2,000 characters.

Course Enrolment Fields

Use the Course Enrolment page to enrol in a course. The Course Enrolment page shows the complete set of fields for a course enrolment.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Enrolment Information	
Course	The name of the course. This field is required.
Objective	The objective, if any, for enrolling in the course.
Enrolment Date	Defaults to current system date during creation. Modifiable during and after creation.
Enrolment Status	The current status of the course enrolment. As preconfigured, this value defaults to Enrolled during creation.
Candidate	The name of the candidate who will be attending the course. Must be a contact already defined in Oracle CRM On Demand. This field is required.

Field	Description
Enrolment Number	Enrolment numbers are usually unique, but Oracle CRM On Demand does not enforce uniqueness.
Completion Date	The date on which the course was completed by the candidate.
Course Partner	The partner company with whom the candidate is enrolling for the specific course.
Additional Information	
Owner	The current owner of the course enrolment.
Description	Additional information about the course enrolment. This field has a limit of 2,000 characters.

Exams

An *exam* is a means of measuring the competency of an individual in a specific skill or set of skills. Exams are usually the next logical step for an individual after completing a course. Typically, a course culminates in an exam or series of exams. An individual is expected to register and appear for the exams upon completing the course. Many companies consider that a course has been successfully completed only if all of the culminating exams have been passed with a minimum passing score.

Just as with a course, an exam can also be associated with a product or group of products as well as a product category or several product categories. In Oracle CRM On Demand, you can define an exam as being for a specific product or a set of products or product categories. You can also associate an exam with one or more courses so that the logical progression from course to exam can be captured accurately.

Because exams are usually administered and managed by authorised testing service providers rather than by the company itself, Oracle CRM On Demand lets you define the list of such third-party vendors for a specific exam. You can use Oracle CRM On Demand to register any contact you have access to for an exam.

Working With the Exam Homepage

The Exam Homepage is the starting point for managing exams.

NOTE: Your company administrator can customise the layout of your Exam Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating an Exam

You can create an exam by clicking the New button in the Recently Modified Exams section. For more information on creating exams, see Creating Records (on page 51) and Exam Fields (on page 562).

Working with Exam Lists

The Exam Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for exams.

Exam List	Description
All Exams	Lists all exams to which you have visibility, regardless of the owner.
Recently Created Exams	All exams that were created in the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently created exam appears first in the list.
Recently Modified Exams	All exams that have been modified within the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently modified exam appears first in the list.
Recently Introduced Exams	All exams that became available within the last 90 days to which you have visibility. The default sort order is reverse chronological, so that the most recently introduced exam appears first in the list.
Retiring Exams	All exams that are scheduled to be retired within the next 90 days to which you have visibility. The default sort order is chronological, so the exam that is about to be retired first appears first in the list.
My Exams	All exams owned by you.
My Recently Created Exams	All exams created within the last 30 days that are owned by you.
My Recently Modified Exams	All exams updated within the last 30 days that are owned by you.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Exams

The Recently Modified Exams section shows the exams that were modified most recently.

To expand the list, click the Show Full List link.

Adding Sections to Your Exam Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Exam Homepage:

- All Exams
- Recently Created Exams
- Recently Modified Exams
- Recently Introduced Exams
- Retiring Exams
- My Exams
- My Recently Created Exams
- My Recently Modified Exams

To add sections to your Exam Homepage

1   On the Exam Homepage, click Edit Layout.

2   On the Exam Homepage Layout page, click the arrows to add or remove sections and to organise the sections on the page.

3   Click Save.

Managing Exams

To manage exams, do the following tasks:

- Associating Exams with Products, Product Categories, and Solutions (on page 559)
- Associating Exams with Courses and Certifications (on page 559)
- Relating Exams to Other Exams (on page 560)
- Making Exams Visible to Partners (on page 560)
- Registering for Exams (on page 561)
- Updating the Exam Registration Record (on page 561)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 103)
- Linking Records to Your Selected Record (on page 104)
- Working with Lists (on page 112)
- Adding Notes (on page 143)

■ Working with Attachments (on page 147)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Associating Exams with Products, Product Categories, and Solutions

You can associate exams with one or more products, product categories, and solutions. If the exam is appropriate for only one product or only one product category, then select the appropriate value from the Primary Product or Primary Product Category field, respectively. However, if the exam is applicable to a solution, more than one product, or more than one product category, follow the steps listed below.

Before you begin.

Your company administrator must have made the Exam Products, Exam Product Categories, or Exam Solutions related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To associate exams with products, product categories, or solutions

1   In the Exam Products, Exam Product Categories, or Exam Solutions section of the Exam Detail page, click Add.

2   On the edit page, specify the product or, product category, and click Save.

3   Repeat the above steps as many times as necessary to define all the relationships.

NOTE: Follow the above steps to relate an exam to solutions, whether the exam is related to one solution or many solutions.

Associating Exams with Courses and Certifications

An exam or series of exams usually indicates the successful completion of a course of certification. If you successfully pass the exam or series of exams, you pass the course or are awarded a certificate. You can associate an exam with courses, certifications, or both.

Before you begin.

Your company administrator must have made the Course Exams or Certification Exams related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To associate exams with courses and certifications

1   In the Course Exams or Certification Exams section of the Exam Detail page, Click Add.

2   In the edit page, specify the course or certification as appropriate.

3   Click Save.

4   Repeat the above steps to add additional course or certificate relationships.

Relating Exams to Other Exams

In Oracle CRM On Demand you can relate an exam to other exams. One exam can be a prerequisite to one exam, a follow-up to another exam, and a replacement for another, possibly retired, exam.

This information is captured only for informational purposes and is mainly intended to help you present your partners with a holistic view of the available exams and their inter-dependencies. Oracle CRM On Demand does not enforce the relationship requirements specified in this section when a contact registers for an exam. Thus, for example, a successful completion or passing of exam A might be defined as a pre-requisite for registering into exam B; however, this pre-requisite will not be enforced by Oracle CRM On Demand and it will allow the contact to register for exam B even though she may have failed exam A or not even have registered for that exam.

NOTE: To ensure that an exam cannot be related to itself, the Related Exam field cannot be the same as the exam on the parent page.

Before you begin.

Your company administrator must have made the Related Exams related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To relate an exam to another exam

1   On the Exam List page, click the name of the exam that you want to relate to another exam.

2   In the Related Exams section of the Exam Detail page, click Add.

3   On the Related Exams Edit page, select the related exam and type of relationship.

4   Click Save.

Making Exams Visible to Partners

Exams are not automatically visible to partners. You can make the exam visible by adding partner employees to a team, and associating that team with the exam record.

Before you begin.

Your company administrator must have made the Exam Team related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To make exams visible to partners

1 In the Exam Team section of the Exam Details page, click Add Users.

2 On the Exam Team Edit page, specify the user name, team role and record access for each partner employee to whom you want the exam to be visible.

> NOTE: Oracle recommends that you grant Read-only access to the partner employee team members.

3 Click Save.

Registering for Exams

You can use Oracle CRM On Demand to register for an exam to prove your competency in a specific product or a set of products.

Before you begin.

Your company administrator must have made the Exam Registrations related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To register for an exam

1 On the Exam List page, click the name of the exam for which you want to register.

2 In the Exam Registrations section of the Exam Detail page, click Register.

3 On the Exam Registration Edit page, select the exam and the candidate whom you want to register.

4 Click Save.

NOTE: Subject to some constraints, Oracle CRM On Demand supports multiple registrations by the same contact for the same exam. A contact might want to register for the same exam more than one time for several reasons, such as to improve upon a previous score or to pass a failed exam or even to renew an expired score. Oracle CRM On Demand allows a contact to register repeatedly for the same exam as long as the exam dates or the owner of the record are different.

Updating the Exam Registration Record

Only users with the appropriate access rights can update the exam registration record. By default, only brand-owner roles, such as Channel Manager, can update the Status field on the registration record. Brand-owner roles and partner roles can update all other fields.

Your company administrator can modify the default access right settings, as required.

Before you begin.

Your company administrator must have made the Exam Registrations related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To update the exam registration record:

1 In the Exam Registration section of the Exam Details page, click the Edit link for the registration record you want to modify.

2 Modify the fields as appropriate.

3 Click Save.

NOTE: The default permissible values for the registration status field are Registered, Passed, and Failed. However, this list is completely configurable and you can modify it to suit your business requirements.

Exam Fields

Use the Exam Edit page to add a course or update details for an existing exam. The Exam Edit page shows the complete set of fields for an exam.

TIP: You can also edit courses on the Exam List page and the Exam Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Information Section	
Name	The name of the exam. This field is case sensitive, so be sure you follow the naming conventions that your company has set up for abbreviations, capitalisation, and so on, to avoid duplicate exams. This field is required.
Type	The exam type that you want to use for this exam.
Status	The status of the exam, such as Planned or Available. Your administrator can modify the possible values for status, you may see a set of values different from those mentioned here. This field is required.
Available From	The date on which the exam is introduced. This field is useful if you plan to introduce an exam over the next few months but want to spread awareness about it to your partner community before the introduction. This field, if specified, decides

Field	Description
	whether or not this exam will be displayed on the Recently Introduced Exams list on the exam home page.
Exam ID	Internal identifier for the exam. Within a company, this identifier is typically unique; however, Oracle CRM On Demand does not enforce uniqueness.
Primary Product Category	The name of the primary product category on which this exam focuses. Use this field only if the exam is focused on a single product category. If the exam is equally appropriate for several product categories, leave this field blank and use the Exam Product Categories related item section instead.
Primary Product	The main product on which the exam focuses. If the course is for more than one product, use the Product related-item to capture the list of products. Use this field only if the exam is focused on a single product. If the exam is equally appropriate for several products, leave this field blank and use the Exam Products related item section instead.
Available Till	The date after which the exam will no longer be offered. Use this field to spread awareness among the partner community that the exam is set to be de-commissioned soon. This field, if specified, decides whether or not this exam will be displayed on the Retiring Exams list on the exam home page.
Exam Details Section	
Number of Questions	The total number of questions in the exam.
Time Allowed (Minutes)	The total time, in minutes, you are allowed when taking the exam.
Maximum Score	The maximum possible score that you can achieve in the exam.
Passing Score	The minimum score that you must obtain to pass the exam.
Validity (Months)	The length of time, in months, that the exam score is valid.
Website	The URL of a page that contains additional information about the exam. The Website field is useful if the exam information is stored and maintained in some application other than Oracle CRM On Demand.
Format	Indicates the delivery format for the exam.
Medium	Indicates the delivery medium for the exam.
Grading Method	The method by which the exam is graded.
Currency	The currency used for the fee.
Exam Fee	The fee charged for taking the exam.

Field	Description
Payment Options	The method by which you will pay for the exam, such as Credit Card, or Check. This is a single-value field. Therefore, if multiple payment options are allowed, define them as a value in the drop-down list. For example, "Check or Credit", "Cash or Credit", and so on.
Contact Information Section	
Contact	Select the main point of contact for the exam. Use this field only if the point of contact already exists as a contact in Oracle CRM On Demand.
Contact: First Name	The first name of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
Contact: Last Name	The last name of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
Contact: Company	The company of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
Contact: Email	The email address of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
First Name	The first name of the point of contact for the exam. Use this field ONLY if the point of contact is not already defined in Oracle CRM On Demand.
Last Name	The last name of the point of contact for the exam. Use this field ONLY if the point of contact is not already defined in Oracle CRM On Demand.
Company	The company of the point of contact for the exam. Use this field ONLY if the point of contact is not already defined in Oracle CRM On Demand.
Email	The email address of the point of contact for the exam. Use this field ONLY if the point of contact is not already defined in Oracle CRM On Demand.
Phone	The phone number of the point of contact for the exam. Use this field ONLY if the point of contact is not already defined in Oracle CRM On Demand.
Additional Information	
Owner	The owner of the exam record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Description	Additional information about the exam. This field has a limit of 2,000 characters.

Exam Registration Fields

Use the Exam Registration page to register for an exam. The Exam Registration page shows the complete set of fields for an exam registration.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Registration Information	
Exam	The name of the exam. This field is mandatory.
Objective	The objective, if any, for registering for the exam.
Registration Date	Defaults to current system date during creation. Modifiable during and after creation.
Registration Status	The current status of the exam registration.
Exam Partner	The partner company administering the specific exam for which the candidate is registering.
Score Expires On	The date on which the score or grade expires.
Candidate	The name of the candidate who will be taking the exam. Must be a contact already defined in Oracle CRM On Demand. This field is required.
Registration Number	Registration numbers are usually unique, but Oracle CRM On Demand does not enforce uniqueness.
Completion Date	The date on which the exam was completed by the candidate.
Score Achieved	The numeric score (if any) achieved on the exam.
Grade Achieved	Letter grade (if any) achieved on the exam.
Exam Date	The date on which the exam is given.
Additional Information	
Owner	The current owner of the exam registration.
Description	Additional information about the exam registration. This field has a limit of 2,000 characters.

Certification

A *certification* is proof of an individual's competency in a specific set of skills. Whereas an exam measures a person's competency, a certification confirms that the person is competent. Certifications are typically awarded after a person has passed one or more exams. Therefore, certifications may be considered a logical progression of course and exams.

While not mandatory, certifications usually have an expiration date associated with them. That is, a person who holds a certificate can claim to be certified only for a defined period, after which she must re-apply for certification. When a certification has an expiration date, it is usually because the awarding company expects the skill or technology (for which the certificate was awarded) to evolve or become obsolete.

Unlike courses and exams, which might or might not be associated with products, a certification is almost always awarded for a specific product or set of products. Oracle CRM On Demand supports the association of a certificate with courses, exams, products, product categories, and solutions. None of these associations is mandatory; that is, you can associate as many or as few of these with a certification as appropriate. In some cases, you can even define a certification that is not associated with any course, exam, product, product category, or solution.

Working with the Certification Homepage

The Certification Homepage is the starting point for managing certifications.

NOTE: Your company administrator can customise the layout of your Certification Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Certification

You can create a certification by clicking the New button in the Recently Modified Certifications section. For more information on creating certifications, see Creating Records (on page 51) and Certification Fields (on page 572).

Working with Certification Lists

The Certification Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for certifications.

Certification List	Description
All Certifications	Lists all certifications to which you have visibility, regardless of the owner.
Recently Created Certifications	All certifications that were created in the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently created certification appears first in the list.

Certification List	Description
Recently Modified Certifications	All certifications that have been modified within the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently modified certification appears first in the list.
Recently Introduced Certifications	All certifications that became available within the last 90 days to which you have visibility. The default sort order is reverse chronological, so that the most recently introduced certification appears first in the list.
Retiring Certifications	All certifications that are scheduled to be retired within the next 90 days to which you have visibility. The default sort order is chronological, so the certification that is about to be retired first appears first in the list.
My Certifications	All certifications owned by you.
My Recently Created Certifications	All certifications created within the last 30 days that are owned by you.
My Recently Modified Certifications	All certifications updated within the last 30 days that are owned by you.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Certifications

The Recently Modified Certifications section shows the certifications that were modified most recently.

To expand the list, click the Show Full List link.

Adding Sections to Your Certification Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Certification Homepage:

- All Certifications
- Recently Created Certifications
- Recently Modified Certifications
- Recently Introduced Certifications

- Retiring Certifications
- My Certifications
- My Recently Created Certifications
- My Recently Modified Certifications

To add sections to your Certification Homepage

1 On the Certification Homepage, click Edit Layout.

2 On the Certification Homepage Layout page, click the arrows to add or remove sections and to organise the sections on the page. Then click Save.

Managing Certifications

To manage certifications, do the following tasks:

- Associating Certifications with Products, Product Categories, and Solutions (on page 569)
- Associating Certifications with Exams and Courses (on page 569)
- Relating Certifications to Other Certifications (on page 570)
- Making Certifications Visible to Partners (on page 570)
- Requesting Certification (on page 571)
- Updating the Certification Request Record (on page 571)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 103)
- Linking Records to Your Selected Record (on page 104)
- Working with Lists (on page 112)
- Adding Notes (on page 143)
- Working with Attachments (on page 147)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Associating Certifications with Products, Product Categories, and Solutions

You can associate certifications with one or more products, product categories, and solutions. If the certification is appropriate for only one product or only one product category, then select the appropriate value from the Primary Product or Primary Product Category field, respectively. However, if the certification is applicable to a solution or solutions, more than one product, or more than one product category, follow the steps listed below.

Before you begin.

Your company administrator must have made the Certification Products, Certification Product Categories, or Certification Solutions related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To associate certifications with products, product categories, or solutions

1 In the Certification Products, Certification Product Categories, or Certification Solutions section of the Certification Detail page, click Add.

2 On the edit page, specify the product, product category, or solution and click Save.

3 Repeat the above steps as many times as necessary to define all the relationships.

NOTE: Follow the above steps to relate a certification to solutions, regardless of whether the certification is related to one solution or many solutions.

Associating Certifications with Exams and Courses

A certification usually requires taking a course or series of courses. These courses culminate in one or more exams. If you successfully pass the exam or series of exams, you are awarded a certificate. You can associate a certification with exams, courses, or both.

Before you begin.

Your company administrator must have made the Certification Exams or Certification Courses related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To associate certifications with exams and courses

1 In the Certification Exams or Certification Courses section of the Certification Detail page, Click Add.

2 In the edit page, specify the exam or course as appropriate.

3 Click Save.

4 Repeat the above steps to add additional exam or course relationships.

Relating Certifications to Other Certifications

In Oracle CRM On Demand you can relate a certification to other certifications. One certification can be a prerequisite to one certification, a follow-up to another certification , and a replacement for another, possibly retired, certification.

This information is captured only for informational purposes and is mainly intended to help you present your partners with a complete view of all the certifications available and their inter-dependencies. Oracle CRM On Demand does not enforce the relationship requirements specified in this section when granting a certification, for example, holding certification A might be defined as a prerequisite for being granted certification B; however, this prerequisite is not enforced by Oracle CRM On Demand and it allows certification B to be granted to a contact even if she does not hold certification A.

NOTE: To ensure that a certification cannot be related to itself, the Related Certification field cannot be the same as the certification on the parent record.

Before you begin.

Your company administrator must have made the Related Certifications related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To relate a certification to another certification

1   On the Certification List page, click the name of the certification that you want to relate to another certification.

2   In the Related Certifications section of the Certification Detail page, click Add.

3   On the Related Certification Edit page, select the related certification and type of relationship. Then click Save.

Making Certifications Visible to Partners

Certifications are not automatically visible to partners. You can make the certification visible by adding partner employees to a team, and associating that team with the certification record.

Before you begin.

Your company administrator must have made the Certification Team related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To make certifications visible to partners

1 In the Certification Team section of the Certification Detail page, click Add Users.

2 On the Certification Team Edit page, specify the user name, team role and record access for each partner employee to whom you want the certification to be visible.

   NOTE: Oracle recommends that you grant Read-only access to the partner employee team members.

3 Click Save.

Requesting Certification

You can use Oracle CRM On Demand to request certification for a specific product or set of products.

Before you begin.

Your company administrator must have made the Certification Requests related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To request certification

1 On the Certification List page, click the name of the certification that you want to request.

2 In the Certification Requests section of the Certification Detail page, click Request Certification.

3 On the Certification Request Edit page, select the certification and candidate for certification. Then click Save.

NOTE: Multiple certification requests for the same contact are supported. This is because contacts may have a need to request the same certification more than once, because either the existing certification has expired or a previous request was declined. Oracle CRM On Demand therefore enables multiple requests to be made for the same certification for the same contact as long as the request dates are different.

Updating the Certification Request Record

Only users with the appropriate access rights can update the certification request record. By default, only brand-owner roles, such as Channel Manager, can update the Status field on the request record. Brand-owner roles and partner roles can update all other fields.

Your company administrator can modify the default access right settings, as required.

Before you begin.

Your company administrator must have made the Certification Requests related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To update a certification request record

1 In the Certification Requests section of the Certification Detail page, click the Edit link for the request record you want to modify.

2 Modify the fields as appropriate.

3 Click Save.

NOTE: The default permissible values for the Certification Status field are Requested, Granted, and Denied. However, this list is completely configurable and your company administrator can modify it to suit your business requirements.

Certification Fields

Use the Certification Edit page to add a certification or update the details for an existing certification. The Certification Edit page shows the complete set of fields for a certification.

TIP: You can also edit certifications on the Certification List page and the Certification Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Information Section	
Name	The name of the certification. This field is case-sensitive, be sure you follow the naming conventions that your company has set up for abbreviations, capitalisation, and so on, to prevent duplicate certifications. This is a required field.
Type	The certification type you want to use for this certification.
Status	The status of the certification, such as Planned or Available. Your administrator can modify the possible values for status, so you may see a set of values different from those mentioned here. This is a required field.
Available From	The date after which the certification is available to be requested. This field, if specified, determines whether or not this certification is displayed on the Recently Introduced Certifications list on the certification home page.
Certification ID	An internal identifier for the certification. Typically unique, but Oracle CRM On Demand does not enforce uniqueness.
Primary Product Category	The name of the primary product category that the contact will be certified for upon successfully achieving the certification. Use this field only if the certification is focused on a single product category. If the certification is equally appropriate for several product categories, leave this field blank and use the Certification Product Categories related item section instead.

Field	Description
Primary Product	The name of the primary product that the partner company will be certified for upon successfully achieving the certification. Use this field only if the certification is focused on a single product. If the certification is equally appropriate for several products, leave this field blank and use the Certification Products related item section instead.
Available Till	The date after which the certification will no longer be offered. This field, if specified, decides whether or not this certification is displayed on the Retiring Certifications list on the Certification homepage.
Certification Details Section	
Validity (Months)	The length of time, in months, that the certification is valid after it has been awarded to a contact. This field is for informational purposes only; Oracle CRM On Demand does not automatically set the validity period of an awarded certification.
Renewable	Indicates whether or not you can renew the certification awarded to a contact.
Website	The URL to a page that contains additional information about the certification. The Web site field is useful if the certification information is stored and maintained in some application other than Oracle CRM On Demand.
Currency	The currency used for the fee.
Certification Fee	The fee charged for awarding the certification.
Payment Options	The methods by which you will pay for the certification, such as credit card or check. This is a single-value field, but multiple payment options may be allowed, for example, "Check or Credit", "Cash or Credit", and so on.
Contact Information Section	
Contact	The contact for the certification.
Contact: First Name	The first name of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
Contact: Last Name	The last name of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
Contact: Account	The account name of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
Contact: Email	The email address of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
First Name	The first name of the point-of-contact for the certification. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Last Name	The last name of the point-of-contact for the certification. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.

Field	Description
Company	The company of the point-of-contact for the certification. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Email	The email address of the point-of-contact for the certification. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Phone	The phone number of the point-of-contact for the certification. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Additional Information	
Owner	The owner of the certification record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Description	Additional information about the certification record. This field has a limit of 2,000 characters.

Certification Request Fields

Use the Certification Request page to request a certification. The Certification Request page shows the complete set of fields for a certification request.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Request Information	
Certification	The name of the certification being requested. This field is required.
Objective	The objective, if any, for requesting the certification.
Request Date	The date of the requested certification. Defaults to the current system date during creation, but is modifiable during and after creation.
Certification Number	The certification numbers, which is usually unique, but Oracle CRM On Demand does not enforce uniqueness.
Renewable	Indicates whether or not the granted certification is renewable.
Candidate	The name of the candidate requesting certification. Must be a contact already

Field	Description
	defined in Oracle CRM On Demand. This field is required.
Certification Date	The date on which the certification was awarded to the candidate.
Certification Status	The current status of the certification request.
Expiration Date	The date on which the awarded certification expires.
Additional Information	
Owner	The current owner of the certification request record.
Description	Additional information about the certification request record. This field has a limit of 2,000 characters.

Accreditation

An *accreditation* is proof of a partner company's ability or competence to sell something or provide an acceptable quality of service. While certifications are awarded to an individual, accreditations are awarded to a partner company. A partner company is awarded an accreditation after satisfying several requirements: usually, one of the requirements is to have a pre-defined minimum number of employees with specific certifications on its payroll. Thus, in some ways, an accreditation is a collection of certifications and is the next step in the logical progression of course to exams to certifications.

Accreditations can be associated with products, product categories and solutions. They can also be related to other accreditations.

Working with the Accreditation Homepage

The Accreditation Homepage is the starting point for managing accreditations.

NOTE: Your company administrator can customise the layout of your Accreditation Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating an Accreditation

You can request an accreditation by clicking the New button in the Recently Modified Accreditations section. For more information on creating accreditations, see Creating Records (on page 51) and Accreditation Fields (on page 581).

Working with Accreditation Lists

The Accreditation Lists section displays a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for accreditations.

Accreditation List	Description
All Accreditations	Lists all accreditations to which you have visibility, regardless of the owner.
Recently Created Accreditations	All accreditations that were created in the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently created accreditation appears first in the list.
Recently Modified Accreditations	All accreditations that have been modified within the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently modified accreditation appears first in the list.
Recently Introduced Accreditations	All accreditations that became available within the last 90 days to which you have visibility. The default sort order is reverse chronological, so that the most recently introduced accreditation appears first in the list.
Retiring Accreditations	All accreditations that are scheduled to be retired within the next 90 days to which you have visibility. The default sort order is chronological, so the accreditation that is about to be retired first appears first in the list.
My Accreditations	All accreditations owned by you.
My Recently Created Accreditations	All accreditations created within the last 30 days that are owned by you.
My Recently Modified Accreditations	All accreditations updated within the last 30 days that are owned by you.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Accreditations

The Recently Modified Accreditations section shows the accreditations that were modified most recently.

To expand the list, click the Show Full List link.

Adding Sections to Your Accreditation Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Accreditation Homepage:

- All Accreditations
- Recently Created Accreditations
- Recently Modified Accreditations
- Recently Introduced Accreditations
- Retiring Accreditations
- My Accreditations
- My Recently Created Accreditations
- My Recently Modified Accreditations

To add sections to your Accreditation Homepage

1 On the Accreditation Homepage, click Edit Layout.

2 On the Accreditation Homepage Layout page, click the arrows to add or remove sections and to organise the sections on the page.

3 Click Save.

Managing Accreditations

To manage accreditations, do the following tasks:

- Associating Accreditations with Products, Product Categories, and Solutions (on page 578)
- Relating Accreditations to Other Accreditations (on page 578)
- Recording Certification Requirements for an Accreditation (on page 579)
- Making Accreditations Visible to Partners (on page 580)
- Requesting Accreditation (on page 580)
- Updating the Accreditation Request Record (on page 581)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)

- Updating Record Details (on page 103)
- Linking Records to Your Selected Record (on page 104)
- Working with Lists (on page 112)
- Adding Notes (on page 143)
- Working with Attachments (on page 147)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Associating Accreditations with Products, Product Categories, and Solutions

You can associate accreditations with one or more products, product categories, and solutions. If the accreditation is appropriate for only one product or only one product category, then select the appropriate value from the Primary Product or Primary Product Category field, respectively. However, if the accreditation is applicable to a solution or solutions, more than one product, or more than one product category, follow the steps listed below.

Before you begin.

Your company administrator must have made the Accreditation Products, Accreditation Product Categories, or Accreditation Solutions related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To associate accreditations with products, product categories, or solutions

1   In the accreditation Products, Accreditation Product Categories, or Accreditation Solutions section of the Accreditation Detail page, click Add.

2   On the edit page, specify the product, product category, or solution and click Save.

3   Repeat the above steps as many times as necessary to define all the relationships.

NOTE: Follow the above steps to relate an accreditation to solutions, regardless of whether the accreditation is related to one solution or many solutions.

Relating Accreditations to Other Accreditations

In Oracle CRM On Demand you can relate an accreditation to other accreditations. One accreditation can be a prerequisite to one accreditation, a follow-up to another, and a replacement for another, perhaps, retired accreditation.

This information is captured only for informational purposes and is mainly intended to help you present your partners with a complete view of all the accreditations and their inter-dependencies. Oracle CRM On Demand does not enforce the relationship requirements specified in this section when granting an accreditation. Thus, for example, holding accreditation A might be defined as a prerequisite for being granted accreditation B; however, this prerequisite is not enforced by Oracle CRM On Demand and allows accreditation B to be granted to a partner company even if it does not hold accreditation A.

NOTE: To ensure that an accreditation cannot be related to itself, the Related Accreditation field cannot be the same as the accreditation on the parent record.

Before you begin.

Your company administrator must have made the Related Accreditations related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To relate an accreditation to another accreditation

1   On the Accreditation List page, click the name of the accreditation that you want to relate to another accreditation.

2   In the Related Accreditations section of the Accreditation Detail page, click Add.

3   On the Related Accreditation Edit page, select the related accreditation and type of relationship, then click Save.

Recording Certification Requirements for an Accreditation

An *accreditation* is proof of a partner company's ability or competence to deliver a product or service. You can use Oracle CRM On Demand to set the certification requirements for an accreditation. For example, you might require that for a partner company to be granted this accreditation, it must have 10% of their employees with the appropriate certification, and the minimum number of employees with the certification must be two. In other words, if there are 40 technical employees on the company's payroll, the company must have at least four employees with the appropriate certification. If there are only 15 employees on the company's payroll, the company still must have two employees with the appropriate certification.

Oracle CRM On Demand does not enforce the certification requirements specified in this section when granting an accreditation. This information is captured only for informational purposes and is mainly intended to educate your partners about the accreditation requirements.

Before you begin.

Your company administrator must have made the Accreditation Certification related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To record certification requirements for an accreditation

1 On the Accreditation List page, click the name of the accreditation for which you want to record certification requirements.

2 In the Accreditation Certifications section of the Accreditation Detail page, click Add.

3 From the Certification picklist, select the appropriate certification.

4 In the Number (#) of Certifications field, type a number if you want to define as a minimum number of employees required to possess this certification.

5 In the Percentage (%) of Employees Certified field, type a percentage if you want to define as a minimum percentage of employees that is required to possess this certification. Then click Save.

Making Accreditations Visible to Partners

Accreditations are not automatically visible to partners. You can make the accreditation visible by adding partner employees to a team, and associating that team with the accreditation record.

Before you begin.

Your company administrator must have made the Accreditation Team related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To make accreditations visible to partners

1 In the Accreditation Team section of the Accreditation Detail page, click Add Users.

2 On the Accreditation Team Edit page, specify the user name, team role and record access for each partner employee to whom you want the accreditation to be visible.

   NOTE: Oracle recommends that you grant Read-only access to the partner employee team members.

3 Click Save.

Requesting Accreditation

If you believe your company has met the requirements for accreditation, you can request accreditation from the partner company.

Before you begin.

Your company administrator must have made the Accreditation Requests related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To request accreditation

1   On the Accreditation List page, click the name of the accreditation that you want to request.

2   In the Accreditation Request section of the Accreditation Detail page, click Request Accreditation.

3   On the Accreditation Request Edit page, select the accreditation and partner, then click Save.

NOTE: Partner companies may have a need to request the same accreditation more than once, because either the existing accreditation has expired or a previous request was declined. Oracle CRM On Demand therefore allows multiple requests to be made for the same accreditation for the same partner company as long as the request dates are different.

Updating the Accreditation Request Record

Only users with the appropriate access rights can update the accreditation request record. By default, only brand-owner roles, such as Channel Manager, can update the Status field on the request record. Brand-owner roles and partner roles can update all other fields.

Your company administrator can modify the default access right settings, as required.

Before you begin.

Your company administrator must have made the Accreditation Requests related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To update an accreditation request record:

1   In the Accreditation Requests section of the Accreditation Detail page, click the Edit link for the request record you want to modify.

2   Modify the fields as appropriate.

3   Click Save.

NOTE: The default permissible values for the Accreditation Status field are Requested, Granted, and Denied. However, this list is completely configurable and your company administrator can modify it to suit your business requirements.

Accreditation Fields

Use the Accreditation Edit page to add an accreditation or update details for an existing accreditation. The Accreditation Edit page shows the complete set of fields for an accreditation.

TIP: You can also edit accreditations on the Accreditation List page and the Accreditation Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help. Administrators can even add additional fields to be part of an accreditation.

The following table provides additional information regarding some fields.

Field	Description
Key Information Section	
Name	The name of the accreditation. This field is case sensitive, so be sure you follow the naming conventions that your company has set up for abbreviations, capitalisation, and so on to ensure you avoid creating duplicate accreditations. This field is required.
Type	The accreditation type that you want to use for this accreditation.
Status	The status of the accreditation, such as Planned or Available. Your administrator can modify the possible values for the status field, so you may see a set of values different from those mentioned here. This is a mandatory field.
Available From	The date from which the accreditation is available. This field, if specified, determines whether or not this accreditation is displayed on the Recently Introduced Accreditation list on the Accreditation homepage.
Accreditation ID	An internal identifier for the accreditation. Typically unique, but Oracle CRM On Demand does not enforce uniqueness.
Primary Product Category	The name of the primary product category that the partner company will be certified for upon successfully achieving the accreditation. Use this field only if the accreditation is focused on a single product category. If the accreditation is equally appropriate for several product categories, leave this field blank and use the Accreditation Product Categories related item section instead.
Primary Product	The name of the primary product that the partner company will be certified for upon successfully achieving the accreditation. Use this field only if the accreditation is focused on a single product. If the accreditation is equally appropriate for several products, leave this field blank and use the Accreditation Products related item section instead.
Available Till	The date after which the accreditation will no longer be available. This field, if specified, decides whether or not this accreditation is displayed on the Retiring Accreditations list on the Accreditation homepage.
Accreditation Details Section	
Validity (Months)	The length of time, in months, that the accreditation is valid after it has been awarded to a partner company.
Renewable	Indicates whether or not you can renew the accreditation awarded to a partner company.
Website	URL to a page that contains additional information about the accreditation. The Web site field is useful if the accreditation information is stored and maintained in some application other than Oracle CRM On Demand.

Field	Description
Currency	The currency used for the fee.
Accreditation Fee	The fee charged for awarding the accreditation.
Payment Options	The methods by which you can pay for the accreditation, such as a credit card or check. This is a single-value field. Multiple payment options may be allowed, for example, "Check or Credit", "Cash or Credit", and so on.
Contact Information Section	
Contact	Select the main point of contact for the accreditation. Use this field only if the point of contact already exists as a contact in Oracle CRM On Demand.
Contact: First Name	The first name of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
Contact: Last Name	The last name of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
Contact: Account	The account name of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
Contact: Email	The email address of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
First Name	The first name of the point-of-contact for the accreditation. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Last Name	The last name of the point-of-contact for the accreditation. Use this field ONLY if the point-of-contact is not already defined in Oracle CRM On Demand.
Company	The company name of the point-of-contact for the accreditation. Use this field ONLY if the point-of-contact is not already defined in Oracle CRM On Demand.
Email	The email address of the point-of-contact for the accreditation. Use this field ONLY if the point-of-contact is not already defined in Oracle CRM On Demand.
Phone	The phone number of the point-of-contact for the accreditation. Use this field ONLY if the point-of-contact is not already defined in Oracle CRM On Demand.
Additional Information	
Owner	The owner of the accreditation record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Description	Additional information about the accreditation record. This field has a limit of 2,000 characters.

Accreditation Request Fields

Use the Accreditation Request page to request an accreditation. The Accreditation Request page shows the complete set of fields for an accreditation request.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Request Information	
Accreditation	The name of the accreditation being requested. This field is required.
Objective	The objective, if any, for requesting the accreditation.
Request Date	The date of the requested accreditation. Defaults to the current system date during creation, but is modifiable during and after creation.
Accreditation Number	The accreditation number, which is usually unique, but Oracle CRM On Demand does not enforce uniqueness.
Renewable	Indicates whether or not the granted accreditation is renewable.
Partner	The name of the partner company requesting accreditation. This field is required.
Accreditation Date	The date on which the accreditation was awarded to the partner company.
Accreditation Status	The current status of the accreditation request.
Expiration Date	The date on which the awarded accreditation expires.
Additional Information	
Owner	The current owner of the accreditation request record.
Description	Additional information about the accreditation request. This field has a limit of 2,000 characters.

9 Life Sciences

Oracle CRM On Demand provides various record types for life sciences information, and for managing the pharmaceutical sales process.

The following tabs are available with Oracle CRM On Demand Life Sciences Edition:

Event. Use these pages to manage events, for example, educational events or customer events, and invitees to those events.

Contact State Licence. Use these pages to record the details of the state licence (or other jurisdiction) to practise medicine, and validate signatures for samples that are dropped off by a sales representative.

Inventory Period. Use these pages to organise the sales force for planning and evaluating metrics (for example, to perform interim audit counts, final audit counts, and reconciliations).

Sample Transaction. Use these pages to create, update, and track different types of sample transactions (transfers, acknowledgements, adjustments, and disbursements or drop sample transactions) and associated transaction items.

Allocation. Use these pages to allocate samples to end users and to track the quantity of sample products as well as the period during which sample products are available for distribution.

Sample Lot. Use these pages to track lot numbers for sample products.

Sample Disclaimer. Use these pages to create, update, and track disclaimers for sample products.

Messaging Plan. Use these pages to manage messaging plans (presentations delivered using a personal computer or tablet computer for sales users).

Messaging Plan Item. Use these pages to specify the items that make up a messaging plan.

Messaging Plan Item Relation. Use these pages to specify a presentation item to provide optional information to support the primary messaging plan item.

Blocked Product. Use these pages to specify that certain products are blocked for certain contacts.

HCP Contact Allocation. Use these pages to create, update, and delete the allocations that are associated with health care professionals.

Life Sciences Processes

You can perform the following tasks using Oracle CRM On Demand Life Sciences Edition:

Tracking Events

You can plan and track events, for example, an educational event, using the Event pages. An event can be as simple as a lunch-and-learn session in a customer's office, or as complex as a seminar series or national-sales meeting for a company. For more information on planning and tracking events, see Events (on page 589).

Business Planning

The Business Planning pages provide a foundation for business-planning activities in the pharmaceutical industry. You can set the goals and objectives for accounts, contacts, and products. You can link these goals and objectives to long-term strategic plans, short-term objectives, hierarchical account plans, key opinion-leader plans, or brand plans. For more information on managing business plans, see Business Planning (on page 385).

Capturing Contact and Account Details and Planning Sales Calls

You can capture and store more detailed information about sales calls, using the call activity portion of the Contact Detail and Account Detail pages. These pages provide a list of call activities and show the call history for a contact or account. For more information on using the Contacts pages, see Contacts (on page 289). For more information on using the Account pages, see Accounts (on page 265) and Working with Activity Lists (on page 192).

Planning Sales Calls

Sales representatives can perform pre-call planning tasks for an account by reviewing the associated contact and account relationships. They can also review the best call times for the contact and the contact's valid medical licence. This planning allows a sales representative to determine the following:

- Which products to explain

- How many samples or promotional items to drop

- Whose signature to capture to complete the sales call

For more information about these tasks, see Tracking Visits (Sales Calls) to Customers (on page 198), Tracking the Best Calling Times (on page 306), Contact State Licences (see "Contact State Licenses" on page 596), and Mass Call Planning (on page 204).

Capturing Customer Information to Meet Regulatory Guidelines

You can capture the following information about customer visits:

- Products detailed

- Samples dropped to customers

- Samples requested by customers

- Promotional or educational items dropped to customers

- Messaging plans discussed

- Message responses

■ Customer signatures captured

This information is typically required to meet the regulations of the Food and Drug Administration (FDA) and similar agencies in other countries. You can store this information in the Call Activity List Page of a contact detail record. For more information on the Activity pages, see the following:

■ Calendar and Activities (on page 177)

■ Working with Activity Lists (on page 192)

■ Tracking Visits (Sales Calls) to Customers (on page 198)

Managing Samples

Samples administrators can perform business processes, such as creating inventory periods, allocation records, and sample inventory records for sales representatives. Sales representatives can create inventory audit reports as requested by the samples administrator and can close out or reconcile inventory periods. Additionally, sales representatives can adjust inventories, transfer samples in and out, and drop samples, which create disbursement transactions. For more information about these tasks, see Managing Samples (on page 599).

Managing Customer Presentations

Sales and marketing organisations can manage their multimedia or graphic file content, create messaging plans, and distribute these messaging plans to the field sales force. Sales organisations can then deliver tailored presentations to customers while automatically capturing metrics related to customer responses. These metrics are passed to the marketing organisation to analyse. Use Oracle CRM On Demand Life Sciences Edition with an offline client application. The client is required for making presentations to customers and capturing the metrics of customer responses. To manage the presentation content and the messaging plans, use Personalised Content Delivery (PCD), a type of sales presentation software. For more information on PCD, see Personalised Content Delivery (on page 693).

Managing Analytics

A sales representative, marketing organisation, management team, or an administrative team within a pharmaceutical company can create detailed analytical reports within Oracle CRM On Demand Answers. Call History, Events, and PCD have analytics components that allow you to manage analytics in these areas of Oracle CRM On Demand Life Sciences Edition. For more information on using Oracle CRM On Demand Answers, see Dashboards (on page 1295) and Reports (on page 907).

Creating Integration Events and Workflow Rules

Integration Events are supported for the following life sciences record types and life sciences-related record types:

■ Activity

■ Business Plan

■ Campaign

■ Contact State Licence

- Event
- Fund
- Fund Request
- HCP Contact Allocation
- Inventory Period
- MDF Request
- Messaging Plan
- Objective
- Order
- Sample Inventory
- Sample Lot
- Sample Request
- Sample Request Item
- Sample Transaction
- Transaction Item

For more information about integration events and workflow rules, see About Integration Events and Creating Workflow Rules.

Performing Activity Assessments

If your company administrator has set up Activity Assessment scripts, then you will be able to perform assessments on tasks, appointments, calls, or planned calls for an account or contact. For more information about assessments, see Setting Up Assessment Scripts and Using Activity Assessment Scripts (on page 220).

Adding Books to Life Sciences Record Types

Books are supported for the following life sciences record types and life sciences-related record types:

- Allocation
- Business Plan
- Event
- HCP Contact Allocation
- Inventory Audit Report
- Inventory Period
- Objectives
- Sample Lot
- Sample Transaction

You can determine which book a user sees by default in the Book selector for each record type. For more information, see Setting Up Default Books by Record Type for a User. For more information about books in general, see Book Management.

Events

Use the Event pages to plan and track events, such as an educational seminar, a symposium, or a customer appreciation event. An event can be as simple as a lunch-and-learn session in a customer's office, or as complex as a seminar series or a national sales meeting.

NOTE: Although the Event and the associated Invitee record types are packaged with Oracle CRM On Demand Life Sciences Edition, you can request that Oracle CRM On Demand Customer Care set them up for your company, even if the company is not a company that uses Oracle CRM On Demand Life Sciences Edition. Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking events, then the Event tab might be excluded from your setup.

Working with the Event Homepage

The Event Homepage is the starting point for managing events.

NOTE: Your company administrator can customise the layout of your Event Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating an Event

You can create an event by clicking the New button in the My Recently Viewed Events section. For more information, see Creating Records (on page 51) and Event Fields (on page 594).

Working with Event Lists

The Event Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for an event.

Event List	Filters
All Events	All events, sorted alphabetically on event name
All Events This Month	Events with Status = Active, In Progress, or Planned and with Start Date that falls within the current month.
All Current Events	Events that meet both of the following conditions: ■ Status = Active, In Progress or Planned ■ Start Date falls in the range of 30 days before today to 60 days after

Event List	Filters
	today.
Recently Created Events	All events, sorted by the created date
Recently Modified Events	All events, sorted by the modified date
My Events	Events with your name in the Owner field

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Events

The My Recently Modified Events section shows the events you modified most recently.

Viewing Event-Related Tasks

The Event-Related Tasks section shows the tasks assigned to you, sorted by due date and then priority. It also shows the following information:

- **Due Date.** Date task is due as set by you or your manager.
- **Arrow.** The priority for tasks as set by you or your manager, such as 1-High, 2-Medium, or 3-Low. The task priority is indicated by arrows: an up arrow for high priority, no arrow for medium priority, and a down arrow for low priority.

  NOTE: If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values.

- **Subject.** Title of task. Click the link to review the task.
- **Event.** The event associated with the task.

To expand the list, click Show Full List.

Adding Sections to Your Event Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Event Homepage:

- Event-Related Tasks

- Recently Created Events

- Recently Modified Events

- My Recently Created Events

- My Recently Modified Events

- One or more report sections (Your company administrator can make report sections available for display on your Event Homepage.)

To add sections to your Event Homepage

1 On the Event Homepage, click Edit Layout.

2 On the Event Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Related Information

See the following topics for related event information:

- Events (on page 589)

- Managing Events (on page 591)

- Event Fields (on page 594)

Managing Events

For information about managing events and invitees, see:

- Tracking Invitees to Events (on page 592)

- About Event and Appointment Synchronisation (on page 220)

NOTE: The Events feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)

- Updating Record Details (on page 103)

- Linking Records to Your Selected Record (on page 104)

- Working with Lists (on page 112)

- Working with Records (on page 46)

- Transferring Ownership of Records (on page 133)

- Deleting and Restoring Records (on page 161)

- Viewing Audit Trails for Records (on page 164)

- Sharing Records (Teams) (on page 134)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related event information:

- Events (on page 589)

- Event Fields (on page 594)

- Working with the Event Homepage (on page 589)

Tracking Invitees to Events

You can track the invitees to an event by their signatures, for example, to confirm the invitee's attendance at a trade show event and store feedback about the event invitation. You can also optionally view lead, opportunity, or account records as related information items for the event.

You can add an unlimited number of invitees to an event. However, the maximum number of invitees that you can add at one time is 145. That is, you can add an unlimited number of invitees, but in groups of up to 145 individuals.

To track invitees to an event

1   Select the Event record.

    For instructions on selecting events, see Finding Records (on page 68).

2   On the Event Details page, scroll to the Invitees section.

    NOTE: To add the Invitees section to the Detail page layout, see Changing Your Detail Page Layout (on page 855).

3   On the Invitees title bar, add invitees by doing one of the following:

■ Click New to add a single invitee to the event at one time.

■ Click Add to add up to five invitees to the event at one time.

■ Click Add List to add more than five invitees to the event at one time.

NOTE: If you plan to use the Event record in the Oracle CRM On Demand Disconnected Mobile Sales application, then do not click Add List to add invitees because the modification tracking required for synchronisation is not supported for this record type. Click Add or New instead. Clicking Add or New opens different Invitees Detail pages that enable you to update either single Invitee records or up to five Invitee records at one time. Clicking Add List opens a Contact Search window that enables you to select more than five contacts as invitees at one time.

4 If you clicked New or Add, complete or update the following information on the Invitees Detail page:

a In the Contact Name field, click the Lookup icon to select an existing contact to add as an invitee. (This is a required field.)

b In the Invitee Status field, select the invitee's status from the drop-down list. The default status is set to Pending. (This is a required field.)

c Add the information for the Session Details and Comments fields, as required.

d Save the Invitees record.

NOTE: Depending on whether you click New or Add on the Invitees title bar, you open different Invitees Detail pages that allow you to update either single Invitee records or multiple Invitee records at one time.

5 If you clicked Add List, then select all the contacts that you want to add as invitees in the Contact Search window, and after you have finished your selections, click OK.

NOTE: You can filter your search by using Books, and you can search by account name, contact type, last name, and first name. You can also add new contacts from the Search window by clicking New. If you must update any of the default values for the Invitee fields of the Invitee records that are created, then edit them by using inline editing on the Event Detail page, or use the Invitee Detail page.

6 On the Event Detail page, update the fields as required.

For information on the Event fields, see Event Fields (on page 594).

7 If invitees to the event are required to provide their signatures, for example, to confirm their attendance to the event, and if your administrator has set up the Signed Status field on the Invitee page layout, then you can check the status of this field in each of the Invitee records.

After a signature is obtained, an external application such as Oracle CRM On Demand Disconnected Mobile Sales validates and sets the Signed Status field through Web services. After this field has been set, you cannot clear it using the Oracle CRM On Demand UI. To view additional details for the signature such as the contact name, or the date and time of the signature capture, you must view the signature related item record for the contact record corresponding to the invitee.

8 If your administrator has set up the lead, opportunity, or account records as related information items, then you can click Add to add accounts, or leads, or opportunities that are targeted for the event.

You can remove any of the accounts, leads, or opportunities that are in place in the related information item sections, as required, by clicking the Delete link in the Edit drop-down menu.

NOTE: You cannot create new accounts, leads, or opportunities in the related information item sections. Your administrator can also set up event records as related information items for account, lead, or opportunity records so that you can view all the events in which an account, lead, or opportunity participates.

9 Save the Event record.

10 (Optional) For any Event record, you can create a new Invitee record from an Invitee Detail page as follows:

a In the Event record, go to the Invitees section and select View from the drop-down list for an Invitee record.

b On the Invitee Detail page, click New and complete the fields for the new Invitee record.

c Click Save to save the new Invitee record.

Oracle CRM On Demand returns you to the Detail page for the first Invitee listed in the Invitees section. To view the new Invitee record that you created, go back to the Event Detail page. The newly created Invitee record is listed in the Invitees section.

Event Fields

Use the Event Edit page to add an event or update details for an existing event. The Event Edit page shows the complete set of fields available for an event.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Event Detail Information	
Name	Name of the event, up to 150 characters. Required field by default.
Location	Limit of 100 characters.
Start Date	Defaults to the current date and time. Required field by default.
End Date	Defaults to one hour later than the current date and time. Required field by default.
Confirm Date	Target date for sending out confirmation about the event to the invitees.
Status	The status of the event. Default values are Active, Cancelled, Completed, In Progress, Inactive and Planned.

Field	Description
Type	The type of event. Limit of 30 characters. Default values are CD_ROM Presentation, Conference, Hospital Display, Journal Club, Lunch and Learn, Meeting, Rounds, Seminar, Symposium, Tradeshow and Trading.
Budget	Budget amount in the currency that you specify. The default is set to the System currency. Your Administrator sets the currency using the Activity Currency field. This field must be added to the Event page layout by your company administrator if you want to use it. For information on adding fields to page layouts, see Customising Static Page Layouts.
Max Attendees	Maximum number of invitees allowed to attend this event.
Product	Product that you want to highlight during the event. You can select either the product or the product category, but not both. To add products, your company administrator navigates to Admin and clicks Content Management.
Product Category	Product category that you want to highlight during the event. You can select either the product or product category, but not both. To add product categories, your company administrator navigates to Admin and clicks Content Management.
CME Credit	Number of Continuing Medical Education (CME) credits for this event. **NOTE:** Your administrator can customise this field by using a more generic name, such as CE Credit, for Continuing Education credits.
Additional Information	
Owner	The owner of the Event record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. The value in the Owner field affects which records are included in reports that you or your managers run from Reports and Dashboard pages. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Owner Full Name	The owner of the Event record.
Event Objective	Limit of 500 characters. Required field by default.
Description	Limit of 250 characters.
Session Details	Details regarding session. Limit of 500 characters.

Field	Description
Owner Full Name	The owner of the Event record.
Modified	The date and user who last modified this event.

Related Information

See the following topics for related event information:

- Events (on page 589)

- Working with the Event Homepage (on page 589)

- Managing Events (on page 591)

Contact State Licenses

Use the Contact State License pages to create, update, and track contact state licenses for a contact.

A *contact state license* records the details of the state license (or another jurisdiction) to practise medicine. It is used to validate the signatures for samples that a sales representative drops (for example, a pharmaceutical sales representative) to a contact (for example, a physician). A physician has only one valid active license for each state at any time. Licenses to practise in a particular jurisdiction are renewable. If the implementation is outside the U.S., the State field is not required.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking Contact State License information, the Contact State License tab might be excluded from your setup.

Working with the Contact State Licence Homepage

The Contact State Licence Homepage is the starting point for managing contact state licence records.

NOTE: Your company administrator can customise the layout of your Contact State Licence Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Contact State Licence

You can create a new contact state licence by clicking the New button in the Recently Modified Contact State Licences section. For more information, see Creating Records (on page 51) and Contact State Licence Fields (on page 598).

Working with Contact State Licence Lists

The Contact State Licence Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for contact state licences.

Contact State Licence List	Filters
All Contact State Licences	All contact state licences to which you have visibility regardless of who owns the contact state licence.
Recently Modified Contact State Licences	All contact state licences with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Contact State Licences

The Recently Modified Contact State Licences section shows the Contact State Licences that you viewed most recently.

Click Show Full List to expand the list.

Adding Sections to your Contact State Licence Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Contact State Licence Homepage:

- Recently Created Contact State Licences

- Recently Modified Contact State Licences

- My Recently Created Contact State Licences

- My Recently Modified Contact State Licences

- Additional report sections (Your company administrator can make report sections available for display on your Contact State Licence Homepage.)

To add sections to your Contact State Licence Homepage

1 On the Contact State Licence Homepage, click Edit Layout.

2 On the Contact State Licence Homepage Layout page, click the directional arrows to add or remove sections, and to organise the sections on the page. Then click Save.

Managing Contact State Licences

For step-by-step procedures for managing contact state licences, see the following topics:

- Creating Records (on page 51)

- Updating Record Details (on page 103)

- Linking Records to Your Selected Record (on page 104)

- Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related contact state licence information:

- Contact State Licences (see "Contact State Licenses" on page 596)

- Working with the Contact State Licence Homepage (on page 596)

- Contact State Licence Fields (on page 598)

Contact State Licence Fields

Use the Contact State Licence Edit page to add a contact state licence or update the details for an existing contact state licence. The Contact State Licence Edit page shows the complete set of fields for a contact state licence.

TIP: You can also edit contact state licences on the Contact State Licence List page and the Contact State Licence Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names of record types, fields, and options in lists. So, the information you see might differ from the standard information described in this table.

The following table provides additional information regarding some of the contact state licence fields.

Field	Description
Contact	The contact for this state licence record, typically a physician or pharmaceutical representative. Click the Lookup icon to choose a contact. (Required.)

Field	Description
Licence Number	The licence number for the contact, for example, PS4231732. (Required.)
State	The U.S. state or jurisdiction associated with the licence number. Use the picklist to select the state, for example, *NJ* for New Jersey. **NOTE:** If your jurisdiction is outside the U.S., the State field is not required.
Expiration Date	The date when the licence expires (MM/DD/YYYY), for example, 10/31/2009. Use the calendar icon to select the expiration date.
Status	The status of the licence, which can be Active or Inactive. ■ **Active.** Set this field to Active when the state licence has been validated. ■ **Inactive.** Set this field to Inactive when the state licence is no longer required.

Related Information

See the following topics for related information about contact state licences:

■ Contact State Licences (see "Contact State Licenses" on page 596)

■ Working with the Contact State Licence Homepage (on page 596)

■ Managing Contact State Licences (on page 598)

■ Setting the Maximum Number of Times Contacts Can Be Sampled Without a Valid State Licence

Managing Samples

Most major pharmaceutical manufacturers provide free samples to health care professionals as part of their regular field sales activities. In the U.S., samples distribution is regulated by the Food and Drug Administration (FDA) and must be reconciled at least once a year. This topic describes how to manage and maintain an electronic inventory of samples and promotional items using Oracle CRM On Demand Samples Management.   Administrators can set up and maintain a sample inventory, and monitor samples delivery, transfers, receipts, discrepancies, adjustments, and inventory counts. End users use samples management in Oracle CRM On Demand to track an electronic inventory of samples stock, create sample transfers, acknowledge receipt of sample transfers, and adjust inventory balances for reconciliation purposes.

Samples management in Oracle CRM On Demand allows samples administrators and sales representatives to measure and monitor sample drops at every level of the organisation. For more information about the differences between samples administrator and end-user tasks, see the following topics.

Scenario for Managing Samples

This topic provides one example showing the process performed by a samples administrator and the sales representatives (end users) who distribute samples to health care professionals. Your company might follow a different process according to its business requirements.

A pharmaceutical company has new products to bring to market. To set up a samples inventory, the samples administrator adds the products to the database, associates any lot numbers, allocates samples to the sales representatives, and transfers samples to the managers and sales representatives in the field. The sales representatives then visit the doctors in their territories and drop the new samples. After a month goes by, each sales representative is required by headquarters to reconcile his or her inventory. The sales representative first provides a final count of each inventory record and a new inventory period begins. The sales representative realises that there are some discrepancies in the inventory when running the reconciliation. After making the necessary adjustments, the sales representative performs a successful reconciliation and marks the inventory as Completed and Reconciled.

In this scenario, samples administrators are responsible for their company's samples inventory and making sure it complies with regulatory rules and guidelines. In this role, they take responsibility for establishing a master samples inventory and then transferring samples to each end user. When end users receive a shipment, they submit a receipt or acknowledgement of the inventory. Oracle CRM On Demand automatically enters the received samples into their inventory counts.

In this scenario, the sales representative, the sales representative's manager, and the samples administrator can monitor discrepancies between shipped quantities and received quantities.

Administrator Procedures

Samples administrators require administrative responsibilities in samples management in Oracle CRM On Demand to carry out the following tasks:

- Define samples as products and add them to the Oracle CRM On Demand database. For more information about setting up products for your company, see Content Management.

- If your organisation uses lot numbers to track samples, then define lot numbers and associate lot numbers with sample products. For more information, see Sample Lots (on page 672).

- Set up an inventory of samples. Each record in the sample inventory provides information to the sales representative about the product that has been categorised as qualifying for sample drop processing. For more information, see Sample Inventory (on page 612).

- Set up allocations and allocate samples to sales representatives. The allocation record determines the period of time within which sample products are provided for the sales representative to distribute to clinics, hospitals, or physician contacts when executing a sample drop call. The allocation record also defines the limits associated with the sample (for example, the maximum quantity that is allowed to be dropped during one call). For more information, see Allocations (on page 663).

  If your samples-management scheme supports blocking a product from a specific health care professional (HCP) or supports limiting the quantity of a specific product that is available to the health care professional, then for more information on allocations, see HCP Contact Allocations (on page 668) or Blocked Products (on page 732).

- Set up an inventory period, which is the defined period within which the movement of samples or promotional items can be tracked. Administrators and sales representatives perform all initial counts, interim audit counts, final audit counts, reporting, and reconciliations within the inventory period. For more information, see Inventory Period (on page 602).

- Transfer samples to end users in the field. For more information, see Creating a Samples Transfer (on page 624).

◼ Monitor samples activities. Activities to monitor include sample drops, sample transfers between employees and headquarters, user inventory counts, and inventory adjustments. For more information, see Monitoring Sample Activities (on page 654).

◼ Store electronic signatures. Electronic signatures are captured in Oracle CRM On Demand and are stored in the Oracle CRM On Demand database. For more information about signatures, see Checking Electronic Signatures (on page 650).

End-User Procedures

The end users are the sales representatives who distribute samples to health care professionals, and they carry out the following tasks:

◼ Acknowledge receipt of sample inventory (that is, of sample transfers). For more information, see Acknowledging Receipt of the Sample Inventory (on page 614).

◼ Transfer samples to other end users or back to headquarters. Sales representatives can exchange samples among themselves and return samples (for example, samples that have expired) to headquarters. For more information, see Creating a Samples Transfer (on page 624).

◼ Drop samples during sales visits to customers. For more information, see Dropping Samples During a Sales Call (on page 630).

◼ Perform interim inventory counts as required. For more information, see Requesting an Interim Inventory Count (on page 608).

◼ Close out inventory periods as required. For more information, see Closing Out an Inventory Period (on page 609).

◼ Account for any discrepancies in inventory records by performing inventory adjustments and submitting other transactions. For more information, see Adjusting Sample Transactions (on page 626), Creating Lost and Found Sample Transactions (on page 628), Viewing Disbursement Transactions (on page 628).

◼ Reconcile the inventory as required. For more information, see Process of Reconciling the Inventory (on page 614).

Requirements for Managing Samples

The following requirements apply to administrators and end users:

◼ **Administrators.** Before you can manage samples in Oracle CRM On Demand, administrators must first define the products. For more information about setting up products for your company, see Content Management.

◼ **End users.** Before end-users can drop samples, they must have an associated allocation record for the samples, and they must acknowledge receipt of the samples. For more information about allocations and acknowledgments, see Allocations (on page 663) and Acknowledging Receipt of the Sample Inventory (on page 614).

Before you begin. Review your user roles:

◼ To perform all administrator procedures, your user role must be assigned administrative responsibilities, must include the Enable Basic Samples Operations privilege, the Enable Samples Adjustment privilege, and (if required) the Signature privilege.

■ To perform all end-user procedures, your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.

Inventory Period

Use the Inventory Period pages to create, update, and track inventory periods. An *inventory period* is a defined period within which all movement of samples or promotional items (sample drops, receipts, transfers, and inventory adjustments) can be tracked. The inventory period is defined by the samples administrator for the customer company. It is used to organise the sales force through planning and evaluating metrics.

Samples administrators and sales representatives perform all initial counts, interim audit counts, final audit counts, and reconciliations within the inventory period:

■ **Initial Count.** The initial count is performed by the sales representative upon receipt of a new inventory. Sales representatives must physically count all samples that they receive and acknowledge that the items are in their possession. For more information, see Acknowledging Receipt of the Sample Inventory (on page 614).

■ **Interim Audit Count.** The samples administrator can request an interim audit count at any time. It is a request to count the inventory and report on it. An interim audit count is often performed as a special case audit where potential fraud activity has occurred, or there appears to be a process issue with tracking the inventory. It acts as a checkpoint for the samples administrator. For more information, see Requesting an Interim Inventory Count (on page 608).

■ **Final Audit Count.** The samples administrator requests the final audit count. In this case, the inventory period is coming to an end, and all samples must be accounted for. The sales representative must count and log the final physical count for each sample, and submit the final audit report. To create an audit report, the sales representative can go to the Inventory Audit Report Homepage, and create a new inventory audit report. The sales representative can also trigger the automatic creation of the final audit report, for more information, see Closing Out an Inventory Period (on page 609).

■ **Reconciliation.** When the final audit count is complete, the sales representative must reconcile the inventory. For this reconciliation, the tracking of internal, sample transactions is compared with the final physical count. Any discrepancies are logged. If no discrepancies exist, the reconciliation is successful, and the inventory period is marked as reconciled. For more information, see Correcting Physical and Electronic Count Discrepancies (on page 630) and Reconciling an Inventory Period (on page 610).

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking inventory period information, the Inventory Period tab might be excluded from your setup.

Types of Inventory Periods

Because reconciling samples inventory can happen as often as once a month, Oracle CRM On Demand Samples Management allows you to reconcile as often as the samples administrator requests you to. It provides three types of inventory periods for maximum flexibility.

The following table describes the types of inventory periods.

Inventory Period	Description

Inventory Period	Description
Active	The current period. It shows no end date, and it is not reconciled. You can enter any type of samples transaction, including adding new products. Inventory counts are adjusted accordingly.
Inactive	A past, unreconciled period. It shows an end date, but it has not been reconciled yet. You can enter any type of samples transaction, except new products to the inventory. The inventory counts are affected accordingly. The default configuration for Oracle CRM On Demand provides one inactive period.
Reconciled	A past, inactive period. It shows an end date and has been successfully reconciled. You cannot perform transactions on this locked-down inventory period.

The default configuration in Oracle CRM On Demand for samples management provides for three unreconciled periods: one active period and two inactive periods. You can have multiple reconciled inventory periods, but only one active inventory period open at any time.

Working with the Inventory Period Homepage

The Inventory Period Homepage is the starting point for managing inventory periods. This page contains several sections and displays information that is relevant to you.

NOTE: Your company administrator can customise the layout of your Inventory Period Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Before you begin. To work with inventory periods, your user role must include the Enable Basic Samples Operations privilege.

Creating an Inventory Period

Only the sample administrator for the company can create an inventory period. Sales representatives cannot create inventory periods. The samples administrator creates the initial inventory period for each sales representative who uses Oracle CRM On Demand Life Sciences Edition. For more information, see Creating Inventory Periods for Users and Creating Records (on page 51).

Working with Inventory Period Lists

The Inventory Period List section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for inventory periods.

Inventory Period List	Filters
All Inventory Periods	All inventory periods to which you have visibility, regardless of who owns the inventory period.

Inventory Period List	Filters
Recently Modified Inventory Periods	All inventory periods with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Inventory Periods

The Recently Modified Inventory Periods section shows the inventory periods most recently modified.

Click the Show Full List link to expand the list.

Adding Sections to Your Inventory Period Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Inventory Period Homepage:

- Recently Created Inventory Periods

- Recently Modified Inventory Periods

- My Recently Created Inventory Periods

- My Recently Modified Inventory Periods

- Additional report sections (Your company administrator can make report sections available for display on your Inventory Period Homepage.)

To add sections to your Inventory Period Homepage

1 On the Inventory Period Homepage, click Edit Layout.

2 On the Inventory Period Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page. Then click Save.

Related Information

See the following topics for related information about inventory periods:

- Inventory Period (on page 602)

- Inventory Period Fields (on page 611)

- Managing Inventory Periods (on page 605)

Managing Inventory Periods

For step-by-step procedures for managing inventory periods, see:

- Adding Sample Inventory to an Inventory Period (on page 605)

- Adding Sample Transactions to an Inventory Period (on page 606)

- Adding Books to an Inventory Period (on page 607)

- Creating an Inventory Audit Report for an Inventory Period (on page 607)

- Requesting an Interim Inventory Count (on page 608)

- Closing Out an Inventory Period (on page 609)

- Reconciling an Inventory Period (on page 610)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)

- Updating Record Details (on page 103)

- Linking Records to Your Selected Record (on page 104)

- Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about inventory periods:

- Inventory Period (on page 602)

- Inventory Period Fields (on page 611)

- Working with the Inventory Period Homepage (on page 603)

Adding Sample Inventory to an Inventory Period

Sample administrators use the Sample Inventory Edit page to add a sample inventory line item to an inventory period for a sales representative, or update details for an existing sample inventory line item. The Sample Inventory Edit page shows the complete set of fields for sample inventory.

Sales representatives cannot add or delete sample inventory line items in an inventory period. However, when performing interim and final audit counts, sales representatives must edit the Physical Count field in the sample inventory line item in an inventory period. For more information about audit counts, see Requesting an Interim Inventory Count (on page 608) and Closing Out an Inventory Period (on page 609).

Before you begin. To add sample inventory line items to an inventory period, your user role must include the Enable Basic Samples Operations privilege.

To add a sample inventory line item to an inventory period

1   On the Inventory Period List page, drill down on the Start Date field to open the inventory period record that you want.

2   On the Inventory Period Detail page, click New in the Sample Inventory section.

3   On the Sample Inventory Edit page, complete the required fields. Then click Save.

For more information about the fields on this page, see Sample Inventory Fields (on page 615).

NOTE: This procedure is suitable if you are adding small numbers of products. For adding multiple inventory records, it is recommended that you create an import file (consisting of the appropriate inventory records), and then ask your company administrator to load the data into the inventory period.

Related Topics

See the following topics for related, sample inventory information:

- Sample Inventory (on page 612)
- Managing Sample Inventory (on page 612)
- Sample Inventory Fields (on page 615)

Adding Sample Transactions to an Inventory Period

Use the Sample Transaction Edit page to add a sample transaction line item to an inventory period, or update details for an existing sample transaction line item. The Sample Transaction Edit page shows the complete set of fields for a sample transaction.

Before you begin. To add sample transactions to an inventory period, your user role must include the Enable Basic Samples Operations privilege.

To add a sample transaction to an inventory period

1   On the Inventory Period List page, drill down on the Start Date field to open the inventory period record that you want.

2   On the Inventory Period Detail page, click New in the Sample Transactions section.

3   On the Sample Transaction Edit page, complete the required fields. Click Save.

For more information about the fields on this page, see Sample Transaction Fields (on page 655).

Related Information

See the following topics for related, sample transaction information:

- Sample Transactions (on page 620)

- Working with the Sample Transaction Homepage (on page 620)

- Managing Sample Transactions (on page 623)

- Sample Transaction Fields (on page 655)

Adding Books to an Inventory Period

Use the following procedure to add books to the active inventory period. When you add a book to the active inventory period, you can then modify or remove the book. This procedure assumes that the book is displayed as a related item on the Inventory Period detail page. For more information about displaying related items, see Customising Related Item Layouts.

To add a book to an inventory period

1 On the Inventory Period List page, drill down on the Start Date field to open the inventory period record that you want.

2 On the Inventory Period Detail page, click Add in the Books section of the page.

3 In the book selector, choose the book that you want to add to the inventory period, and then click OK.

   For more information about books, see Book Management.

4 When required, close out the inventory period by clicking the Close Out button.

   When an inventory period is closed, an inventory audit report is generated, and a new inventory period is created. All sample inventory and book information attached to the closed inventory period is copied to the new inventory period and inventory audit report. For more information, see Closing Out an Inventory Period (on page 609).

Creating an Inventory Audit Report for an Inventory Period

Use the Inventory Audit Report Edit page to create an inventory audit report for an inventory period or update details for an existing inventory audit report. The Inventory Audit Report Edit page shows the complete set of fields for an inventory audit report.

Before you begin. To create an inventory audit report for an inventory period, your user role must include the Enable Basic Samples Operations privilege.

To create an inventory audit report for an inventory period

1   On the Inventory Period List page, drill down on the Start Date field to open the inventory period record that you want

2   On the Inventory Period Detail page, click New in the Inventory Audit Reports section.

3   On the Inventory Audit Report Edit page, complete the required fields, and click Save.

For more information about the fields on this page, see Inventory Audit Report Fields (on page 618).

After you create an inventory audit report, you cannot change it. If an error is noted in a generated inventory audit report, you must make an inventory adjustment to correct the error first, and then generate a new inventory audit report after the inventory adjustment has been processed.

Related Topics

See the following topics for related information about inventory audit reports:

■   Inventory Audit Report (on page 617)

■   Managing Inventory Audit Reports (on page 617)

■   Inventory Audit Report Fields (on page 618)

Requesting an Interim Inventory Count

When sales representatives return to their office, they are generally required to do a physical inventory count. They request an interim inventory count, which allows them to audit their inventory of samples and submit the information to the samples administrator. The samples administrator typically issues a requirement for a physical audit of inventory. The interim audit is based on corporate guidelines. An interim audit count is often performed as a special-case audit where potential fraud activity has occurred, or there appears to be a process issue with tracking the inventory. It acts as a checkpoint for the samples administrator.

You can count your physical inventory at any time during the active, unreconciled inventory period. Only active inventory periods are considered when you request an interim inventory count.

Before you begin. To request an interim inventory count, your user role must include the Enable Basic Samples Operations privilege.

To request an interim inventory count

1   On the Inventory Period List page, drill down on the Start Date field to open the inventory period record on which you want to perform an audit.

2   For each Sample Inventory line item, enter a value in the Physical Count field.

The value that you enter in the Physical Count field must correspond to the physical quantities that you have on hand for each product.

3   Click Interim Count.

Then the following occurs:

■ The value in the Last Physical Count field changes to reflect the physical quantity value prior to your current physical quantity value. Then you can validate and compare the old physical count with the new physical count.

■ A new inventory audit report is created where all line items are copied over from the current inventory.

■ The current inventory period remains open.

NOTE: The Interim Count button is enabled for inventory periods that are active only.

Closing Out an Inventory Period

As an inventory period closes, the sales representative must count and log the final physical count for each sample, and submit the final audit report. The sales representative submits the final audit count (either by product or lot number) by closing out the inventory period. When you close out an inventory period, you are closing it and triggering the creation of an inventory audit report. You can close out active inventory periods only.

Closing out an inventory period is also an important step in .

Before you begin. To close out an inventory period, your user role must include the Enable Basic Samples Operations privilege.

To close out an inventory period

1 On the Inventory Period List page, drill down on the Start Date field to open the inventory period record that you want to close out.

2 For each Sample Inventory line item, enter a value in the Physical Count field.

The value that you enter in the Physical Count field must correspond to the physical quantity that you have on hand for each product.

3 Click Close Out.

When you click Close Out, the following happens:

■ The inventory period that you opened in step 1 is closed by assigning an inventory period end date, and a new inventory period is created containing all the records that were in the old inventory period.

■ The values from the Physical Count field (in the Sample Inventory records) in the old inventory period are copied to the Opening Balance field (in the corresponding Sample Inventory records) in the new inventory period.

■ All samples that have not expired are copied from the old inventory period to the new inventory period.

■ Any expired samples with a quantity greater than zero are copied from the old inventory period to the new inventory period.

■ All book information associated with the old inventory period is copied to the new inventory period.

■ An Inventory Audit Report is created. All sample inventory and book information associated with the old inventory period is copied to the new Inventory Audit Report.

NOTE: When you click the Close Out button, an error message appears if the status of the inventory period is not Active, or if the Physical Count field is empty in any of the sample inventory records.

4 Go back to the Inventory Period List page, and open the same inventory period record that you opened in Step 1.

Notice that an inventory audit report has been created as a child of the closed inventory period. The inventory audit report contains a snapshot of the inventory records and the final physical count when the inventory period closes. The inventory audit report and its associated records are locked, cannot be changed, and remain as a historical audit trail for the samples administrator.

Reconciling an Inventory Period

Sales representatives are required to reconcile their samples at least once a year. You can start reconciliations at various times during the year, but only on inventory periods that have been closed. All transactions associated with an inventory period must be completed before the inventory period can be fully reconciled.

Reconciling an inventory period is the final step in Process of Reconciling the Inventory (on page 614).

Before you begin. To reconcile an inventory period, your user role must include the Enable Basic Samples Operations privilege.

To reconcile an inventory period

1 On the Inventory Period List page, drill down on the Start Date field to open the inventory period record that you want to reconcile.

The inventory period that you open must be closed. You can reconcile a period only if there is no difference between the physical count and the amount that Oracle CRM On Demand calculates, and if there are no pending transactions in the inventory period.

2 Click Reconcile.

An error message is displayed if any of the following conditions are true:

■ There are transactions associated with the inventory period that have a status of In Progress.

■ There are previous inventory periods that are still open.

■ The variance is not within an acceptable limit. Currently, the variance is set to zero.

3 Go back to the Inventory Period List page, and open the same inventory period record that you opened in Step 1. If the reconciliation is successful, the Reconciled flag is selected.

NOTE: End users must create transfer transactions for any samples transferred to another representative or returned to headquarters for the period before the reconciliation. Also, mobile users must synchronise their local database with the server database before submitting an inventory count. This synchronisation is important if they are recording samples received in a prior period, or if they are recording samples received in a period that has not become active yet.

Inventory Period Fields

Use the Inventory Period Edit page to add an inventory period or update details for an existing inventory period. The Inventory Period Edit page shows the complete set of fields for an inventory period.

TIP: You can also edit inventory periods on the Inventory Period List page and the Inventory Period Detail page. For more information about updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the inventory period fields. Most of these fields are read only for sales representatives, but editable for sample administrators. The Active field and the Reconciled field are automatically set by Oracle CRM On Demand according to whether or not an inventory period has completed or been reconciled.

Field	Description
Start Date	The start date for this inventory period.
End Date	The date that this inventory period expires.
Active	This check box is automatically set by Oracle CRM On Demand and indicates whether the inventory period is active or closed: ■ If selected, then this inventory period is currently active. All current dropped samples and promotional items use this active inventory period for processing. ■ If not selected, then this inventory period has completed, or has been closed out, and is inactive. For more information, see Closing Out an Inventory Period (on page 609).
Owner	The owner of this inventory period.
Created	The date and user who created this inventory period.
Modified	The date and user who last modified this inventory period.
Reconciled	Oracle CRM On Demand sets this check box automatically. It indicates whether or not the reconciliation process has been successfully run for this inventory period: ■ If selected, then this inventory period has been fully reconciled with no discrepancies, is inactive, and locked. ■ If not selected, then this inventory period has not been successfully reconciled. For more information, see Reconciling an Inventory Period (on page 610).

Related Topics

See the following topics for related information about inventory periods:

Sample Inventory

Use the Sample Inventory pages to create, update, and track sample inventory records.

A *sample inventory* record tells the sales representative about the product that has been categorised as qualifying for dropping a sample. The samples administrator approves the product and assigns a quantity to the sales representative. The sales representative can keep the sample until she can distribute it to a validated physician, clinic, or hospital facility. A sample inventory record can be defined at the product level or at the sample lot level. Rules about the quantity that can be distributed to any given contact are kept in the allocation record for that product sample. The allocation record and the sample inventory record track the process of executing a sales call and dropping a sample or promotional item.

About the Tracking Process for Sample Inventory Records

When the samples administrator sends sample shipments to end users in the field, the sales representative must acknowledge receipt of the sample inventory. The sales representative must physically receive the sample inventory, count it, and acknowledge the quantity. This process forms the starting point for the sample inventory tracking process, and ultimately results in reconciling the inventory at the end of the inventory period.

During an inventory period, the sales representative might have requests from the samples administration manager to perform audits on an inventory. Then, the sales representative   uses the sample inventory records to generate an inventory audit report. When an inventory period ends, the inventory is counted and maintained in the sample inventory record and the remaining inventory is copied to the new inventory period. Reconciling the inventory period confirms that the inventory matches the calculations obtained by processing the transaction records for the products. All records must match before the inventory period is considered to be *reconciled*.

Managing Sample Inventory

For step-by-step procedures for managing sample inventory, see:

- Calculating a Running Total of the Sample Inventory (on page 613)

- Acknowledging Receipt of the Sample Inventory (on page 614)

- Process of Reconciling the Inventory (on page 614)

- Adding Sample Inventory to an Inventory Period (on page 605)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)

- Updating Record Details (on page 103)

- Linking Records to Your Selected Record (on page 104)

- Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related, sample inventory information:

- Sample Inventory (on page 612)

- Sample Inventory Fields (on page 615)

Calculating a Running Total of the Sample Inventory

At the beginning of an inventory period, a sales representative can have *quantity n* of *product x*. During the inventory period, the sales representative performs various transaction tasks (for example: transfers in, transfers out, sample drops, adjustments, and acknowledgements). As each transaction task is started and completed, Oracle CRM On Demand updates the running count for product x.

Based on the sample transaction activity, Oracle CRM On Demand keeps a record of the current count for all products by calculating the *representative inventory balance*. To calculate the representative inventory balance, Oracle CRM On Demand takes the quantity of product x at the beginning of each inventory period and does the following:

- Adds shipment acknowledgements

- Adds sample transactions of the type, Transfer In

- Subtracts sample transactions of the type, Transfer Out

- Subtracts sample transactions of the type, Disbursement (a drop sample transaction)

- Subtracts sample transactions of the type, Return

- Adds or subtracts sample transactions depending on the type of Inventory Adjustment and the value in the quantity field. A negative number is acceptable to indicate a loss, theft, or human error.

Before you begin. To view the running count of the sample inventory, the System Count field must be displayed on the Sample Inventory Detail and Sample Inventory Edit page. By default, the System Count field is not displayed, so contact your samples administrator to configure the field setup for sample inventory pages. For more information about field management, see Record Type Application Customisation Page.

To view the quantity at last physical count

1 On the Inventory Period List page, drill down on the Start Date field to open the inventory period record that you want.

2 On the Inventory Period Detail page, go to the Sample Inventory section.

For each Sample Inventory line item, the value in the Last Physical Count field shows the quantity of the inventory at the time that the last inventory audit report was run. The System Count field shows the initial sample quantity that was transferred by headquarters to the sales representative. For more information about the fields on this page, see Sample Inventory Fields (on page 615).

Acknowledging Receipt of the Sample Inventory

When the samples administrator sends samples to end users in the field, when end users exchange samples, or when end users return samples to headquarters, the recipient of the transaction must acknowledge receipt of the sample inventory. The recipient must physically receive the sample inventory, count it, and acknowledge the quantity. This step is the starting point for tracking sample inventory and ultimately results in reconciling sample inventory at the end of the period.

Oracle CRM On Demand Samples Management supports the electronic movement of sample inventory through the process of Creating a Samples Transfer (on page 624). Samples are routed to a recipient who must then acknowledge receipt of the samples before Oracle CRM On Demand can transfer the new inventory to the recipient's active inventory period.

End users can acknowledge full or partial receipt of a samples transfer. For more information, see the following:

■ Acknowledging Full Receipt of a Samples Transfer (on page 625)

■ Acknowledging Partial Receipt of a Samples Transfer (on page 625)

Before you begin. To acknowledge receipt of the sample inventory, your user role must include the Enable Basic Samples Operations privilege.

NOTE: When acknowledging receipt of the sample inventory, if the end user does not already have records corresponding to the sample product, sample lot, or inventory period associated with the sample inventory being transferred, then Oracle CRM On Demand creates these records.

Process of Reconciling the Inventory

This topic describes how to reconcile the inventory.

Before you begin. Do the following:

■ Your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.

■ Meet the following requirements:

   ■ **Verify that previous inventory periods are reconciled.** Users must reconcile previous inventory periods in chronological order. This requirement is a concern only if a company's configuration allows more than one inactive, unreconciled period.

   ■ **Acknowledge the receipt of inventory transfers.** Users must send acknowledgements for all received sample inventory shipments.

   ■ **Create transfer transactions for transferred samples.** Users must create transfer transactions for any samples transferred to another representative or returned to headquarters.

◼ **Mobile users must synchronise with the server database.** Mobile users must synchronise their local database with the server database before submitting an inventory count. This requirement is important if they are recording samples received in a previous period.

Restrictions That Apply When Reconciling the Inventory

Note the following restrictions:

◼ The counts for transferred and received samples are not reflected in the inventory count until their records have been submitted.

◼ An inventory period cannot be reconciled if any discrepancy exists between physical counts of the inventory and electronic counts of the inventory. If a discrepancy exists, it must be corrected before a user can reconcile the period.

To reconcile the inventory, perform the following tasks:

1 Closing Out an Inventory Period (on page 609)

2 Correcting Physical and Electronic Count Discrepancies (on page 630)

3 Reconciling an Inventory Period (on page 610)

Sample Inventory Fields

Use the Sample Inventory Edit page to add a new sample inventory record to an inventory period, or update details for an existing, sample inventory record. The Sample Inventory Edit page shows the complete set of fields for a sample inventory.

TIP: You can also edit a sample inventory on the Sample Inventory List page and the Sample Inventory Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the sample inventory fields.

Field	Description
Sample	The product associated with this sample inventory record. **NOTE:** When creating a new sample inventory record, only products that are categorised as samples (that is, products of category type Samples Dropped) can be entered in this field.
Lot #	The lot number associated with the sample product selected. This field is optional. **NOTE:** When adding or updating a sample inventory record, click the Lookup icon to select a sample lot. Only sample lots that are being tracked by lot number in the inventory (that is, sample lots that have the Inventory by Lot check box selected) are available for selection. For more information about sample lots, see Sample Lots (on page 672) and Sample Lot Fields (on page

Field	Description
	675).
Opening Balance	The initial quantity received from headquarters at the beginning of the inventory period.
Last Physical Count	The quantity of inventory at the time that the latest inventory audit report was run.
Physical Count	A physical count of the balance on hand. The sales representative enters this value. **NOTE:** This is the only field that the sales representative can modify.
System Count	The initial quantity transferred by headquarters to the sales representative. For more information about viewing a running count of the sample inventory, see Calculating a Running Total of the Sample Inventory (on page 613). **NOTE:** By default, the System Count field is not displayed on the Sample Inventory Detail page and Sample Inventory Edit page, so contact your samples administrator to configure the field set-up for sample inventory pages.
Difference	The difference between the value in the Physical Count field and the value in the Last Physical Count field. Oracle CRM On Demand automatically populates this field whenever an inventory period is closed out. For more information see, Closing Out an Inventory Period (on page 609).
Lot #: Expiration Date	The date on which the sample is set to expire. This date is relevant if using a sample lot to track sample inventory records.
Lot #: CutOff Date	A calculated date upon which the sample will expire. The formula to calculate the lot number cutoff date is as follows: Expiration Date minus the number of Short Days equals the CutOff Date.
Created	The date, timestamp, and user who created this sample inventory record.
Modified	The date, timestamp, and user who last modified this sample inventory record.

Related Information

See the following topics for related information about sample inventories:

- Sample Inventory (on page 612)

- Managing Sample Inventory (on page 612)

- Adding Sample Inventory to an Inventory Period (on page 605)

Inventory Audit Report

Use the Inventory Audit Report pages to create and track inventory audit reports.

An *inventory audit report* is generated by Oracle CRM On Demand when a sales representative creates an interim or final audit count for the inventory period. Administrators and sales representatives can view previously submitted inventory counts (interim and final close-out periods) on the Inventory Audit Report List page.

The inventory audit report is a useful tool for sample compliance administrators to check that samples are being distributed appropriately by individual sales representatives. Inventory audit reports allow compliance administrators to meet certain regulatory requirements during the year. When the inventory audit report has been created you cannot change it.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking inventory audit report information, the Inventory Audit Report tab might be excluded from your setup.

Managing Inventory Audit Reports

For step-by-step procedures for managing inventory audit reports, see:

■ Requesting an Interim Inventory Count (on page 608). An interim audit count is a request to count the inventory and generate an inventory audit report.

■ Closing Out an Inventory Period (on page 609). End users must count and log the final physical count for each sample and submit the final audit report. Closing out an inventory period automatically triggers the creation of the final inventory audit report.

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

■ Attaching Files to Records through Attachment Fields (on page 154)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about inventory audit reports:

■ Inventory Audit Report (on page 617)

■ Inventory Audit Report Fields (on page 618)

■ Creating an Inventory Audit Report for an Inventory Period (on page 607)

Inventory Audit Report Fields

Use the Inventory Audit Report List page to view inventory audit report records. After an inventory audit report has been created or generated, you cannot modify or change it.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information about some of the inventory audit report fields.

Field	Description
Key Inventory Audit Report Information	
Type	The type of inventory audit report, which can be one of the following: ■ **Closeout Inventory Count.** This type of inventory audit report closes out an inventory period by counting and logging the final physical count for each sample. You can close out only active inventory periods (for more information, see Closing Out an Inventory Period (on page 609)). ■ **Interim Inventory Count.** This type of inventory audit report counts your physical inventory at any time during the active, unreconciled inventory period. Only active inventory periods are considered when you request an interim inventory count (for more information, see Requesting an Interim Inventory Count (on page 608)).
Status	The status of the inventory audit report describes the state of the record and can be one of the following: ■ **In Progress.** The initial state of an inventory audit report. ■ **Submitted.** The inventory audit report has been reviewed by the sales representative and submitted to his or her manager for approval. ■ **Rejected.** The inventory audit report was reviewed by the sales representative's manager and has been rejected as incomplete or inaccurate. ■ **Approved.** The inventory audit report was reviewed by the sales representative's manager and was accepted as a valid accounting of inventory. ■ **Cancelled.** The inventory audit report did not follow the approval process and was cancelled.
Reason	The reason the inventory audit report is required, which can be one of the following: ■ **Annual.** Select this option if you are generating a standard interim inventory count for the past year. ■ **Annual - Close Out.** Select this option if you are generating the standard

Field	Description
	closeout inventory count for the year.
	■ **For Cause.** Select this option if you are generating an ad hoc interim inventory count as requested by the samples administrator.
	■ **For Cause - Close Out.** Select this option if the samples administrator requests that you generate a closeout inventory count outside of the expected inventory period.
	■ **Special - Interim.** Select this option if the samples administrator requests that you generate an ad hoc inventory audit report.
	■ **Weekly - Interim.** Select this option if you are generating an interim inventory count for the past week.
	■ **Monthly - Interim.** Select this option this option if you are generating an interim inventory count for the past month.
	■ **Termination - Close Out.** Select this option if the sales representative has been terminated and a separate party is counting the remaining inventory.
Comments	Additional comments entered about the inventory audit report.
Reported Date	The date that the report was generated.
Completed Date	The date that the report received final approval.
Attachment	If this field is exposed on the page, you can attach a file to the inventory audit report. The field initially shows a paper clip icon on the record Edit page: 📎 You can attach a file to the inventory audit report by clicking the paper clip icon on the record Edit page and then selecting the file that you want to upload. After the file is uploaded and the record is saved, the Attachment field on the record Detail page shows the name and size of the attachment file. On the record Edit page, the field also shows the paper clip icon and an X icon that can be used to remove the file. You can attach only one file to each inventory audit report record. For instructions on attaching files to records through the Attachment field, and information about the restrictions on file sizes and file types, see Attaching Files to Records through Attachment Fields (on page 154).
Key Inventory Period Information	
Inventory Period	The inventory period that the audit report is associated with.
Owner	The sales representative who runs the inventory audit report and who owns the inventory records.
Created	The user, date, and timestamp when the report was generated.

Field	Description
Modified	The user, date, and timestamp when the report was approved or rejected.

Related Topics

See the following topics for related information about inventory audit reports:

◼ Inventory Audit Report (on page 617)

◼ Managing Inventory Audit Reports (on page 617)

◼ Creating an Inventory Audit Report for an Inventory Period (on page 607)

Sample Transactions

Use the Sample Transaction pages to create, update, and track sample transactions and associated transaction items for samples.

A *sample transaction* is a record for a sample transfer, receipt, sample drop, or inventory adjustment. Oracle CRM On Demand assigns each sample transaction record a unique identifier for tracking purposes. You create a sample transaction so that all movement of samples and promotional items can be reported and reconciled at the end of an inventory period, and a running count of inventory products can be maintained during an inventory period. Each sample transaction record represents a single transaction that can consist of one or more line item entries (transaction items). Transactions are associated with the appropriate inventory period depending on their transaction date. All sample drop and promotional item drop activity generates a disbursement transaction (drop sample transaction). Transferring inventory to and from headquarters and sales representatives generates two transaction records:

◼ One for the *transfer out* for the sending entity

◼ One for the *transfer in* for the entity that receives the sample

Sales representatives or headquarters can create adjustment transactions to account for discrepancies in inventory due to loss, theft, returns, found, or human error. When sample transactions have a status of Submitted, no changes can be made to the transaction information. If a change is required, you must generate a new transaction adjustment.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking sample transaction information, the Sample Transaction tab might be excluded from your setup.

Working with the Sample Transaction Homepage

The Sample Transaction Homepage is the starting point for managing sample transactions.

NOTE: Your company administrator can customise the layout of your Sample Transaction Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Before you begin. To work with sample transactions, your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.

Creating a Sample Transaction

You can create a new sample transaction by clicking the New button in the Recently Modified Sample Transactions section. For more information, see Creating Records (on page 51) and Sample Transaction Fields (on page 655).

You can create the following types of sample transactions:

■ **Sent transactions.** For more information, see Creating a Samples Transfer (on page 624).

■ **Adjustment transactions.** For more information, see Adjusting Sample Transactions (on page 626).

■ **Lost and found transactions.** For more information, see Creating Lost and Found Sample Transactions (on page 628).

You cannot create the following types of sample transactions because Oracle CRM On Demand generates them automatically whenever sales representatives drop samples during sales calls:

■ **Disbursement transactions.** You can view disbursement transactions. If changes are required for a disbursement transaction, you must create a new inventory adjustment transaction. For more information, see Viewing Disbursement Transactions (on page 628).

■ **Received transactions.** End users must acknowledge the receipt of samples. If a sales representative receives a quantity of samples that was different from the quantity sent to her, an inventory adjustment transaction must be created to record the discrepancy. For more information, see Acknowledging Receipt of the Sample Inventory (on page 614).

Working with Sample Transaction Lists

The Sample Transaction List section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for sample transactions.

Sample Transaction List	Filters
All Sample Transactions	All sample transactions to which you have visibility, regardless of who owns the sample transaction.
Adjustment Transactions	All sample transactions with your name in the Owner field that are of the type, Inventory Adjustment.
Disbursement Transactions	All sample transactions with your name in the Owner field that are of the type, Disbursement.
Discrepancy Transactions	All sample transactions with your name in the Owner field that have a status of Processed with Discrepancy.
Lost Transactions	All sample transactions with your name in the Owner field that are of

Sample Transaction List	Filters
	the type, Inventory Adjustment, with a reason of Lost.
Received Transactions	All sample transactions with your name in the Owner field that are of the type, Transfer In.
Recently Modified Sample Transactions	All sample transactions with your name in the Owner field, sorted by the modified date.
Sent Transactions	All sample transactions with your name in the Owner field that are of the type, Transfer Out.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Sample Transactions

The Recently Modified Sample Transactions section shows the sample transactions most recently modified. Click the Show Full List link to expand the list.

Adding Sections to Your Sample Transaction Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Sample Transaction Homepage:

- Recently Created Sample Transactions

- Recently Modified Sample Transactions

- My Recently Created Sample Transactions

- My Recently Modified Sample Transactions

To add sections to your Sample Transaction Homepage

1 On the Sample Transaction Homepage, click Edit Layout.

2 On the Sample Transaction Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page. Then click Save.

Related Topics

See the following topics for related information about sample transactions:

- Sample Transactions (on page 620)

- Sample Transaction Fields (on page 655)
- Managing Sample Transactions (on page 623)

Managing Sample Transactions

For step-by-step procedures for managing sample transactions, see:

- Creating a Samples Transfer (on page 624)
- Acknowledging Full Receipt of a Samples Transfer (on page 625)
- Acknowledging Partial Receipt of a Samples Transfer (on page 625)
- Adjusting Sample Transactions (on page 626)
- Creating Lost and Found Sample Transactions (on page 628)
- Viewing Disbursement Transactions (on page 628)
- Adding Transaction Items to a Sample Transaction (on page 629)
- Correcting Physical and Electronic Count Discrepancies (on page 630)
- Dropping Samples During a Sales Call (on page 630)
- Checking Electronic Signatures (on page 650)
- Monitoring Sample Activities (on page 654)
- Setting Up the Automatic Submission of Sample Transactions

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 103)
- Linking Records to Your Selected Record (on page 104)
- Working with Lists (on page 112)
- Attaching Files to Records through Attachment Fields (on page 154)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

- Sample Transactions (on page 620)
- Working with the Sample Transaction Homepage (on page 620)
- Sample Transaction Fields (on page 655)

Life Sciences

■ Transaction Item Fields (on page 660)

Creating a Samples Transfer

A *samples transfer* is a sent transaction of the type Transfer Out. You create a samples transfer whenever product samples are exchanged within your company. This procedure can be used by:

■ A samples administrator to send shipments to end users in the field

■ End users to exchange samples between themselves

■ End users to send samples to headquarters

After a samples transfer has been submitted in Oracle CRM On Demand, the recipient receives a samples transfer of type Transfer In. After the recipient acknowledges the receipt of the transaction, Oracle CRM On Demand enters the new inventory in the inventory count and decreases the inventory items from the sender's inventory records.

Before you begin. To create a samples transfer, your user role must include the Enable Basic Samples Operations privilege.

To create a samples transfer

1 On the Sample Transaction List page, click New.

2 On the Sample Transaction Edit page, set Transaction Type to Transfer Out.

Transfer Out indicates that you are transferring samples to another user.

3 Set the status to In Progress.

4 Enter the name of the person who will receive the sample in the Transfer To field.

5 Complete the remaining fields on the Sample Transaction Edit page as required (see Sample Transaction Fields (on page 655) for more information), and then click Save.

6 Add at least one transaction item line item, as described in Adding Transaction Items to a Sample Transaction (on page 629).

7 Add or modify the books associated with the record as required.

8 Click Submit.

If there are no errors, the status of this new transfer out transaction record changes to In Transit, and Oracle CRM On Demand automatically creates a new recipient transaction record where the transaction type is Transfer In and the status is In Transit.

Any book information associated with the transfer out transaction is copied to the new recipient transaction.

The new received transaction record inherits all the transaction item line items from the transfer out transaction record.

Acknowledging Full Receipt of a Samples Transfer

Oracle CRM On Demand supports the electronic movement of sample inventory. For more information, see Creating a Samples Transfer (on page 624). Samples are routed to a recipient who must then acknowledge receipt of the samples before Oracle CRM On Demand can transfer the new inventory into the recipient's active inventory period.

End users can acknowledge full receipt of a samples transfer as described in the following procedure, or partial receipt of a samples transfer as described in Acknowledging Partial Receipt of a Samples Transfer (on page 625).

When acknowledging receipt of a samples transfer, if the end user does not already have records corresponding to the sample product, sample lot, or inventory period associated with the sample inventory being transferred, then Oracle CRM On Demand creates these records accordingly.

Before you begin. To acknowledge receipt of a samples transfer, your user role must include the Enable Basic Samples Operations privilege.

To acknowledge full receipt of a samples transfer

1 On the Sample Transaction Homepage, click Received Transactions in the Sample Transaction List section.

2 On the Sample Transaction List page, drill down on the Name field to open the transaction that you want to acknowledge.

   The transaction that you open must be of type Transfer In and have a status of In Transit.

3 Review the details of the transaction, and in the Transaction Items section, enter values in the Received Quantity fields to reflect the quantity of sample products received.

   The Shipped Qty field shows the quantity of items shipped and is a read-only field.

4 Click Acknowledge.

   If there is no difference between the received and shipped quantities, then the status of the transaction changes to Processed, and you have acknowledged full receipt of the samples transfer.

   If there is a difference between the received and shipped quantities, then you have the option to either close the transaction with a discrepancy, or keep the transaction open with a status of Partially Received. For more information, see Acknowledging Partial Receipt of a Samples Transfer (on page 625).

NOTE: The quantities of samples transferred do not appear in end users inventory counts until they acknowledge receipt of the samples.

Acknowledging Partial Receipt of a Samples Transfer

Oracle CRM On Demand supports the electronic movement of sample inventory. For more information, see Creating a Samples Transfer (on page 624). Samples are routed to a recipient who must then acknowledge receipt of the samples before Oracle CRM On Demand can transfer the new inventory to the recipient's active inventory period.

End users can acknowledge full receipt of a samples transfer as described in Acknowledging Full Receipt of a Samples Transfer (on page 625), or partial receipt of a samples transfer as described in the following procedure.

When acknowledging receipt of a samples transfer, if the end user does not already have records corresponding to the sample product, sample lot, or inventory period associated with the sample inventory being transferred, then Oracle CRM On Demand creates these records accordingly.

Before you begin. To acknowledge receipt of a samples transfer, your user role must include the Enable Basic Samples Operations privilege.

To acknowledge partial receipt of a samples transfer

1   On the Sample Transaction Homepage, click Received Transactions in the Sample Transaction List section.

2   On the Sample Transaction List page, drill down on the Name field to open the transaction that you want to acknowledge.

    The transaction that you open must be of the type Transfer In and have a status of In Transit.

3   Review the details of the transaction, and in the Transaction Items section, enter values in the Received Quantity fields to reflect the quantity of sample products received.

    The Shipped Qty fields shows the quantity of items shipped and is a read-only field.

4   Click Acknowledge.

    If there is a difference between the received and shipped quantities, then a discrepancy transaction is automatically generated by Oracle CRM On Demand with a status of Processed with Discrepancy. If there is no difference between the received and shipped quantities, then Oracle CRM On Demand changes the status of the transaction to Processed, and you have acknowledged full receipt of the samples transfer.

NOTE: The samples transfer quantities do not appear in end users inventory counts until they acknowledge receipt of the samples.

Adjusting Sample Transactions

Sales representatives must track inventory and make sure that each sample is accounted for during the reconciliation. The adjustment feature allows samples administrators and end users to adjust inventory counts of samples by adjusting past, sample transactions (transactions that have already been processed). Common reasons for adjusting past, sample transactions include: product loss, product thefts, counting errors, or data entry errors. You can add products or adjust quantities for any type of sample transaction (transfer, lost, stolen, received, drop sample transaction or disbursement, and so on). You use adjustments to reconcile the original quantity from the samples administrator record with the quantity that exists when the sales representative counts the physical inventory.

You can adjust any transaction of any type that has a transaction status of Processed. After an existing transaction has been processed, you cannot adjust it again. You must create a new inventory adjustment record. For more information, see the following topics:

■   Adjusting an Existing Inventory Adjustment Record (on page 627)

■ Creating a New Inventory Adjustment Record (on page 627)

Before you begin. To create adjustments (sample transactions of the type, Inventory Adjustment), your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.

Adjusting an Existing Inventory Adjustment Record

You can adjust any transaction of any type that has a transaction status of Processed. After an existing transaction has been processed, you cannot adjust it again. You must create a new adjustment record, see Creating a New Inventory Adjustment Record (on page 627).

Before you begin. To adjust existing inventory adjustment records, your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.

To adjust an existing inventory adjustment record

1 On the Sample Transaction List page, open a transaction of type Inventory Adjustment with a transaction status of Processed.

2 Add or modify the books associated with the record, as required.

3 Click Adjust.

This step creates a new transaction of type Inventory Adjustment with a status of In Progress.

All transaction item line items are copied to the new record. Any book information associated with the original transaction is copied to the new transaction.

4 Modify the key transaction information, as required.

For more information about the fields in this section of the page, see Sample Transaction Fields (on page 655).

5 Modify the transaction items, as required.

For example, you can modify the quantity for an existing transaction item line item, add a new transaction item line item, or delete an existing transaction item line item. For more information about the fields in this section of the page, see Transaction Item Fields (on page 660).

6 Click Submit to submit the new inventory adjustment transaction record.

If there are no errors, the status of the new inventory transaction record changes to Submitted.

Creating a New Inventory Adjustment Record

To resolve discrepancies between physical counts of the inventory and electronic counts of the inventory, end users and samples administrators must create and submit adjustment transactions. Sales representatives and samples administrators record changes to their sample transactions by creating new sample transaction records of the type, Inventory Adjustment.

Before you begin. To create inventory adjustment records, your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.

To create a new inventory adjustment record

1 On the Sample Transaction List page, click New.

2 On the Sample Transaction Edit page, set Transaction Type to Inventory Adjustment.

3 Enter a reason in the Reason field, for example, Lost samples, Found samples, or Initial Count.

4 Complete the remaining fields on the Sample Transaction Edit page as required, and then click Save.

   For more information about the fields on this page, see Sample Transaction Fields (on page 655).

5 Add at least one transaction item line item, as described in Adding Transaction Items to a Sample Transaction (on page 629).

6 Click Submit.

Creating Lost and Found Sample Transactions

Sales representatives can record any lost or found sample transactions that they notice in their inventory by creating new lost and found sample transaction records.

Before you begin. To create lost and found sample transactions, your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.

To create a new lost or found sample transaction record

1 On the Sample Transaction List page, click New.

2 On the Sample Transaction Edit page, set Transaction Type to Inventory Adjustment.

3 Enter a reason in the Reason field, for example: Lost or Found.

4 Complete the remaining fields on the Sample Transaction Edit page as required, and then click Save.

   For more information about the fields on this page, see Sample Transaction Fields (on page 655).

5 Add at least one Transaction Item line item.

   For more information, see Adding Transaction Items to a Sample Transaction (on page 629).

6 Click Submit.

Viewing Disbursement Transactions

End users cannot create disbursement transactions (drop sample transactions). Oracle CRM On Demand automatically generates disbursement transactions whenever sales representatives drop samples during sales calls.

NOTE: End users cannot create received transactions either. Oracle CRM On Demand automatically generates transfer in transactions whenever sales representatives return previously dropped samples or transfer out samples to headquarters or another sales representative.

Before you begin. To view disbursement transactions, your user role must include the Enable Basic Samples Operations privilege.

To view disbursement transactions

1   On the Sample Transaction Homepage, click Disbursement Transactions in the Sample Transaction List section.

2   On the Sample Transaction List page, drill down on the Name field to open the disbursement transaction that you want to view.

3   On the Sample Transaction Detail page that is displayed, review Key Transaction Information, Key Contact Information, and Transaction Items information.

    For more information about the fields on this page, see Sample Transaction Fields (on page 655).

    End users cannot update or change any of the information on this page. If any modifications or corrections are required for a disbursement transaction, a new inventory adjustment transaction must be created, see Creating a New Inventory Adjustment Record (on page 627).

NOTE: In a similar way, you can also view received transactions by selecting the appropriate option from the Sample Transaction List.

Adding Transaction Items to a Sample Transaction

Use the Sample Transaction Edit page to add a transaction item line item to a sample transaction, or update the details for an existing transaction item line item in a sample transaction.

Before you begin. To add transaction items to sample transactions, your user role must include the Enable Basic Samples Operations privilege.

To add a transaction item to a sample transaction

1   On the Sample Transaction List page, drill down on the Name field to open the transaction record that you want.

2   On the Sample Transaction Detail page, click New in the Transaction Items section.

3   On the Transaction Item Edit page, complete the required fields. Click Save.

    For more information about the fields on this page, see Transaction Item Fields (on page 660).

Related Topics

See the following topics for related information about transaction items:

■ Transaction Items (on page 658)

■ Managing Transaction Items (on page 658)

■ Transaction Item Fields (on page 660)

Correcting Physical and Electronic Count Discrepancies

To correct discrepancies between physical counts of the inventory and electronic counts of the inventory (as recorded by Oracle CRM On Demand when samples were transferred), samples administrators and end users must create and submit adjustment transactions.

Correcting physical and electronic count discrepancies is also an important step in Process of Reconciling the Inventory (on page 614).

Before you begin. To correct discrepancies between physical counts of the inventory and electronic counts of the inventory, your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.

Samples administrators and sales representatives can use one or all of the following options to correct discrepancies between physical counts of the inventory and electronic counts of the inventory:

■ Creating and submitting a sample adjustment transaction with one or more line items. For more information, see Creating a New Inventory Adjustment Record (on page 627).

■ Adjusting the line item records of previously entered transactions that have not yet been submitted. For more information, see Adjusting an Existing Inventory Adjustment Record (on page 627).

Dropping Samples During a Sales Call

During a sales call, sales representatives take samples from their inventory and drop them to physicians, pharmacists, clinics, hospitals, and other appropriate contacts. The sales representative must do the following:

■ Count each sample that was dropped.

■ Verify that the sample is appropriate for the physician and his or her specialty.

■ Capture authorised signatures to complete the transaction.

Product Requirements for Linking Products to a Call Record. Only products of the category type Samples Dropped, Promotional Item Dropped, Products Detailed, or Sample Request Item that meet the following conditions can be linked to a call record:

■ The products are not blocked for the primary contact for the sales call. During a sales call, the sales representative cannot provide any products that are blocked for the primary contact on the call, including any blocked product information, sample, or promotional item products. A product might be blocked for a contact for corporate, regulatory, or legal reasons. For example, a pharmaceutical company might want to prevent the disclosure of the details of a test drug. For information about blocking products for contacts, see Blocked Products (on page 732).

NOTE: If a product is blocked for the primary contact on a sales call, then the sales representative cannot link the product to the call record, even if the sales representative has an allocation for that product. Products that are blocked for the primary contact on a call are not available for selection in the list of products that can be added to the call. If no primary contact exists for the call, then no products are blocked.

■ The products have been allocated to the sales representative.

■ The products are present in the sales representative's inventory in the case of samples and promotional items.

■ The products are active on the current call date.

Guidelines for Setting Up Sales Call. Consider the following guidelines when setting up sales calls for dropping samples or promotional items, or detailing products:

■ Make sure that all attendee or contact calls have an associated primary contact.

■ Make sure that all attendee, contact, or account calls have an associated address.

■ Do not alter the primary contact information after the call record is created and has an associated sample drop, promotional item, product detail, or sample request defined.

Before you begin. To drop off samples, request samples, and distribute promotional items during a sales call, your user role must include the Enable Basic Samples Operations privilege.

To drop samples during a sales call

1   On the Contacts Homepage, open the contact to whom you want to drop samples.

2   On the Contact Detail page in the Calls section, click New Call or Auto Call to add a new line item.

   ■ Clicking New Call brings you to the Call Edit page where you must enter most information manually for the new call record.

      Make sure that you specify Call in the Type field. Otherwise, the following related items will not be available to you: Samples Dropped, Promotional Items, Products Detailed.

   ■ Clicking Auto Call brings you to the Call Detail page where the following field data is filled automatically in for the new call record.

      ■ The Status field has a value of Planned.

      ■ The End Date field has a value equal to the Start Date plus 30 minutes.

      ■ The Type field has a value of Call.

3   On the Call Edit or Call Detail page, do the following:

   a   To populate the new call record with information from an existing smart call template, click the Lookup icon next to the Smart Call field and select the smart call.

   b   Enter or update the information.

      For more information about the fields on the Call Edit and Call Detail page, see Tracking Visits (Sales Calls) to Customers (on page 198).

4   Save the record by doing one of the following:

   ■ On the Call Edit page, click Save.

   ■ On the Call Detail page, click either Save as a Private Smart Call or Save as a Public Smart Call.

   For more information, see Saving Call Detail Information as a Template (on page 649).

5 Next, do one of the following on the Call Detail page as required:

■ Add products detailed, samples dropped, sample request, or promotional item line items to the parent call record.

NOTE: Only products that are not blocked for the primary contact for the call can be added to the parent call record. Products that are blocked for the primary contact are not available for selection on the product list.

■ Add an attendee line item to the parent call record, then add products detailed, samples dropped, sample request, or promotional item line items to the attendee record.

For more information about these tasks, see the following topics:

■ Adding Attendees to Calls (on page 632)

■ Adding Multiple Contacts to Account Calls (on page 634)

■ Linking Product Detailed Information to Calls (on page 636)

■ Linking Samples Dropped Information to Calls (on page 640)

■ Linking Promotional Item Information to Calls (on page 643)

■ Linking Sample Request Information to Calls (on page 645)

6 When ready, click Submit to submit the call detail information for processing.

For information, see Submitting Call Detail Information for Inventory Tracking.

Related Topics

See the following topics for related information about sample drops:

■ Managing Allocations (on page 665)

■ Tracking Visits (Sales Calls) to Customers (on page 198)

■ Setting the Maximum Number of Times Contacts Can be Sampled

■ Authorising Contacts to Receive Samples

Adding Attendees to Calls

An *attendee* is an individual who is present on a given occasion for a meeting or phone call. An account call can have multiple attendees, and each individual attending an account call can have different unique items or specific interactions that the sales representative will record. Reporting at an individual-interaction level allows the sales representative to record what sample or promotional item was dropped off and which products detailed or sample request information was recorded for each individual interaction.

An *attendee call* is an individual call that is associated with a parent account call. Attendee calls operate like professional calls, except that they are linked to account calls. Attendee calls are separate records with a call type of Attendee Call.

Access Profile Settings for Attendee Calls

To access and add attendees to a parent account, you must have the appropriate settings in your access profiles. The following table shows the access level setting for the Attendee Call related information record type that allows you to access attendee calls on a parent account. The setting is required on both your default access profile and your owner access profile. When the access level is configured for the Attendee Call related information record type, attendee calls will behave similarly to other calls (account or contact calls) within the call framework. Top level permission for attendee calls, however, is restricted to the permission defined on the parent activity. For more information about access profiles, see Access Profile Management and Process of Setting Up Access Profiles.

Record Type	Related Information Record Type	Access Level
Activity	Attendee Calls	View

NOTE: Attendee calls are grandchildren of account and the child of Account Call (which is a type of Activity). As a result, access to attendee calls must be configured from the Activity record type related information section.

The following procedure describes how to add an attendee to a call.

To add an attendee to a call

1   Go to the Accounts Homepage, and select the account that you want.

For information on selecting records, see Finding Records (on page 68).

2   On the Account Detail, scroll down to the Calls section, and open the account call record for which you want to add an attendee.

3   On the Call Detail page, click New Call in the Attendees section.

NOTE: If the Attendees section is not visible on your Details page, click the Edit Layout link in the upper-right corner of the page, and add the Attendees section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

4   On the Attendee Detail page, do the following:

a   To populate the new call record with information from an existing smart call template, click the Lookup icon next to the Smart Call field and select the smart call.

b   Enter or update the information as required. However, note the following:

■   The value in the Call Type field, which is read-only, is Attendee Call by default.

■   The Account information is populated from the account call.

■   The Address information is populated from the account call.

■   You must use the Primary Contact field to select the contact who is attending the account call.

For more information about the fields on this page, see Tracking Visits (Sales Calls) to Customers (on page 198).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names of record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help. Custom fields that your company administrator defined are saved in the Smart Call template.

5 Click Save to save the attendee record.

6 On the Attendee Detail page, enter any products detailed, samples dropped, sample request, and promotional item information for this attendee record as shown in the following topics:

- Linking Product Detailed Information to Calls (on page 636)

- Linking Samples Dropped Information to Calls (on page 640)

- Linking Promotional Items Information to Calls (see "Linking Promotional Item Information to Calls" on page 643)

- Linking Sample Request Information to Calls (on page 645)

NOTE: Only products that are not blocked for the primary contact for the call can be added to the Attendee Detail page. Products that are blocked for the primary contact are not available for selection on the product list.

7 When done, click Back to Call Detail.

The Attendees section lists the newly added attendee.

8 When ready, click Submit to submit the call detail information for processing.

For more information, see Submitting Call Detail Information for Inventory Tracking.

Adding Multiple Contacts to Account Calls

An account call can contain multiple contacts. You can automatically create an attendee call for each contact, using the Oracle CRM On Demand Generate Calls feature, which enables you to reduce the number of keystrokes when creating calls. This feature also provides consistent information for the Contacts and Attendee Calls related information sections of the account call.

Considerations Before Adding Multiple Contacts to an Account Call

Before you add multiple contacts to an account call, using this procedure, consider the following:

- The selected contacts are associated with the account call unless the contact has the Blocked Reason Code field set. If the contact has the Blocked Reason Code set, then the contact is not added to the account call nor is an attendee call generated, and Oracle CRM On Demand displays a message indicating that the contact is blocked. For more information on blocking contacts, see Blocking Contacts (on page 308).

- For each contact that is not blocked, Oracle CRM On Demand generates an attendee call when you select Generate Calls on the Account Call Detail page. The generated attendee calls are visible in the Attendee Call tab of the Account Call Detail page. The generated attendee calls have the Date, Time, Duration, Account, Address, Status, Subject fields populated from the parent account call.

- You can see the correlation between the attendee call and the contact list for the account call as follows:

  - If the contact is removed or deleted, then the attendee call is also removed or deleted.

■ If the attendee call is removed or deleted, then the contact is also removed or deleted, as long as the account call is not in the Signed, Submitted, or Completed status.

■ If the contacts are merged within the account call UI flow, then Oracle CRM On Demand removes the attendee calls for the secondary contact.

■ If you have provided products detailed information, using the Products Detailed related information section or the Available Products for Detailing related information section in the account call, then the individual attendee calls are populated with the same product detailed information when the calls are created using Generate Calls.

■ If you have documented the samples dropped, promotional items dropped, or products detailed for a call, but if you have not submitted the call, and if a blocked product record is associated with the contact, then the call submission continues without error. The product must be blocked the first time that the sample or promotional item is dropped or the product detail is created so that the product is blocked from call reporting. If you have already entered the item in Oracle CRM On Demand and blocked the product, then call processing proceeds correctly. For more information on product blocking, see Blocked Products (on page 732).

Before you begin. The person performing this procedure, typically a company administrator or a field service representative, requires the LS Manage Call privilege and access to Account Call, Contact Call, and Attendee Call records in the access profiles.

To add multiple contacts to an account call

1 Go to the Accounts Homepage, and select the account that you want.

For information on selecting records, see Finding Records.

2 On the Account Detail, scroll down to the Calls section, and open the account call record for which you want to add an attendee.

3 On the Account Call Detail page, click Add in the Contacts related information section, and from the Search for Contacts window, select the contacts that are participating in the call, and then click OK when you have finished selecting the contacts.

   NOTE: If the Contacts section is not visible on the Call Details page, click the Edit Layout link in the upper-right corner of the page, and add the Contacts section to your page layout. If the section is not available to add to your page layout, then contact your company administrator.

4 On the Account Call Detail or any of the generated Attendee Call Detail pages, enter any products detailed, samples dropped, sample requests, and promotional item information as shown in the following topics:

   ■ Linking Product Detailed Information to Calls (on page 636)

   ■ Linking Samples Dropped Information to Calls (on page 640)

   ■ Linking Promotional Item Information to Calls (on page 643)

   ■ Linking Sample Request Information to Calls (on page 645)

   NOTE: You can add only products that are not blocked for the primary contact for the call to the Attendee Detail page. Products that are blocked for the primary contact are not available for selection on the product list.

5   When you are done, click Back to Call Detail.

The Contacts section lists the newly added contacts.

6   When you are ready, click Submit to submit the call detail information for processing.

For more information, see Submitting Call Detail Information for Inventory Tracking.

Linking Product Detailed Information to Calls

You can link product detailed information to calls in one of the following ways:

■ By adding products detailed information to a parent call

■ By adding attendees to the parent call and then adding the products detailed information for each individual attendee record

You add attendees to a parent account call so that the products detailed, samples dropped, sample request, and promotional item information can be tracked for each individual who attends the meeting.

For information on how to associate product detailed information with Structured Product Messaging (SPM) information, see Associating Call Objectives, Next Call Objectives, and Outcomes to Products Detailed in a Sales Call (on page 715).

This procedure describes how to link product detailed information to a call record.

Considerations When Choosing to Use the Available Products for Detailing Information Section or the Products Detailed Related Information Section

This topic describes the considerations when using the Available Products for Detailing information section or the Products Detailed information section to link product detailed information to calls:

■ Available Products for Detailing Related Information Section

Available Products for Detailing provides a list of products that the sales representative can detail to customers. The list is based on the sales representative's allocation records. Administrators can customise the Available Products for Detailing section to remove the Indication picklist, add the Product Indication record, add new fields, and use customised page layouts. In addition, administrators can include their own custom fields as with other Oracle CRM On Demand related information sections. In Release 24 and earlier releases, the Indication picklist was a required field along with the Priority field. This requirement no longer applies.

NOTE: Messaging Plan objects that support Structured Product Messaging cannot be linked to Available Products for Detailing.

■ Products Detailed Related Information Section

If your company wants to document call objectives, next call objectives, and outcomes, then use the Products Detailed related information section instead of Available Products for Detailing.

Products Detailed has historically provided a selection menu of all products of type Detail where the sales representatives could choose which products to include in the detailing session. It provides an administrative filter that allows a sales representative to only display the products allocated to the sales representative. The Products Detailed related information section is fully customisable because administrators can add new fields as required. Administrators can add the Product Indication record

type to Products Detailed and replace the optional Indication picklist. Products Detailed also supports the Structured Product Messaging record types and information.

For more information, on customising Oracle CRM On Demand, see Application Customisation.

About Product Field Synchronisation in Products Detailed, Messaging Plan Items, Messaging Plan Relations, and Message Response Records

The Product field in the Messaging Plan Item, Messaging Plan Item Relations, and Message Response related information records (related PCD records) must be associated with an available product from the parent Products Detailed record. When you associate a product in the related PCD records by using the Lookup selector, the selector lists only the products that are available in the parent Products Detailed record. However, after completing the association of the Product field in the Products Detailed record with the related PCD records, a user can subsequently change the parent product in the Products Detailed record. Consequently, the previously saved related PCD child records that have been enforced with the same product as in the Products Detailed record become out of synchronisation. For this reason, do not update the Product field in a Products Detailed record after you have associated the product with the related PCD records.

About Process Administration Rules for Locking Activity Records and Call Product Detailed Records

Through Oracle CRM On Demand Process Administration, your administrator can create the following record locking rules:

- A rule   to lock an Activity record along with its child records

- A rule to lock the   Call Product Detailed record along with its child records

In this case, when you submit a Call Activity record, Oracle CRM On Demand synchronises the status of   the Call Product Detailed record and the status of the Call Activity record. When the Call Activity is marked as Submitted, Oracle CRM On Demand also marks the Products Detailed record as Submitted. If the Process Administration locking rule for Activity where the status is set to Submitted locks the Activity child records, then it is recommended that you also use a similar Process Administration locking rule for Call Product Detailed when its status is set to Submitted. For more information on setting up record locking rules for Oracle CRM On Demand Life Sciences Edition, see *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.

Important Consideration for Products Detailed Related Information Section Operations

Because of the unique nature of the Products Detailed functionality, always perform operations related to products detailed from the Products Detailed related information section in a Call Detail page. You can perform products detailed operations from the following locations:

- (Recommended) The Products Detailed related information section in a Call Detail page, which supports four operations: New, Edit, Inline Edit, and Delete. All four operations generate Integration Event Queue (IEQ) XML that includes the parent Activity record.

- (Not recommended) The Products Detailed Detail page, displayed by clicking Product Name in the Products Detailed related information section, supports three operations: Edit, Inline Edit, and Delete. All three operations generate IEQ XML that does not include the parent Activity record. If you perform such

operations from the Products Detailed Detail page, then workflow actions that you have configured using these operations or other actions that depend on the generated IEQ XML might not behave as expected.

To link product detailed information to a call record

1 On the Call Detail or Attendee Detail page, scroll down to either the Available Products for Detailing section or the Products Detailed section, and do one of the following:

NOTE: If the section that you want is not visible on your page, then click the Edit Layout link in the upper-right corner of the page, and add the section to your page layout. If the section is not available to add to your page layout, then contact your company administrator.

■ In the Available Products for Detailing section, enter the required information in the Indication, Priority (optional), and Issues (optional) fields.

Only products of category type Products Detailed that are not blocked for a primary contact, that have been allocated to the sales representative, and that are active on the current date are visible in the available products list to link to the call record.

For information on the fields, see the table at the end of this topic.

■ In the Products Detailed section, click New, and enter the required information on the Product Detailed Edit page.

For information on the fields, see the table at the end of this topic.

NOTE: If your company administrator has set the Enable Filtering of Product Selection by Sales Rep Allocation setting, then only the products that are allocated to the sales representative appear in the Product selector. For more information, see Setting Up Picklist Filtering Based On the Allocation Records for a Sales Representative.

NOTE: Product Detailed fields are copied to the new record when you create a new call record from a smart call template.

To access the Attendee Detail page, go to the Attendees section on the Call Detail page, and open the attendee record that you want.

2 Save the record.

3 Repeat steps 1-2 to add more product detailed line items to the call record.

4 When ready, click Submit to submit the call detail information for processing.

For information, see Submitting Call Detail Information for Inventory Tracking.

Field	Description
Key Product Detailed Information	
Product Category	(View only) The product category that the company administrator defines. For example, it can be one of the following: ■ Samples Dropped ■ Promotional Item Dropped

Field	Description
	■ Products Detailed
Product	(Required) The name of the product (for example, a medical device), discussed or demonstrated to the customer. Select the item, using the Lookup selector. For information on setting up products, see Setting Up Company Products and Product Fields (on page 661). Only products of the category type Samples Dropped, Promotional Item Dropped, Products Detailed, or Sample Request Item that meet the following conditions can be linked to a call record: ■ The products are not blocked for a primary contact. ■ The products have been allocated to the sales representative, and the company administrator has set the Enable Filtering of Product Selection by Sales Rep Allocation setting. For more information, see Setting Up Picklist Filtering Based On the Allocation Records for a Sales Representative. ■ The products are active on the current call date.
Priority	Optional field for customer use.
Indication	The condition that the product addresses. Some examples are: Allergy, Asthma, Arrhythmia, Heart Failure, and so on. Use the drop-down list to select an indication. Before Release 23, the Indication field was a required field by default. However, for the current release, this field is no longer required. However, if your company has customised the page layout for the Product Detailed category in Release 23, then the Indication picklist field remains a required field for those customised layouts. To change this field to Not Required, your company administrator must deselect the Required check box for the field that was set up in the customised page layout for product details. For more information on field set-up, see Creating and Editing Fields.
Issues	This field is optional field for customer use. Some examples include: Side Effects, Efficacy, Cost versus Generics, Price, and so on. Use the drop-down list to select an issue.
NOTE: The following fields are not available by default. However, your company administrator can add them to your Product Detail page layout. For more information, see Customising Static Page Layouts.	
Detailed Product	This value is set to the same value as in the Product field. Changing this value by using the Lookup selector changes the Product field to the same value.
Primary Messaging Plan Item	The messaging plan item that is designated as the primary message for the detailed product.

Field	Description
Primary Messaging Plan Relations	The messaging plan item relations record that is designated as the primary for the detailed product.
Primary Message Response	The message response that is designated as the primary for the detailed product.
Type	The Product Detailed category. Use the picklist to choose the type.

The default values for Type are Message Response, Outcome, Call Objective, and Next Call Objective. However, your company administrator can add additional types, if required. Selecting a type can result in a different page layout from the default page layout for the Products Detailed record type if your administrator has set up dynamic page layouts for this record type. For example, selecting Call Objective can result in a Call Objective page layout, if it is set up by your administrator. For more information on setting up dynamic page layouts for this record type, see Specifying Dynamic Page Layouts and also see the topics about page layouts in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*. |
| Product Indication | A combination of a symptom or malady and the specific product or drug that alleviates the symptom or malady that is typically detailed by pharmaceutical sales representatives during a call with a health practitioner. For more information, see Product Indications (on page 720). |
| Detail Notes | Additional information about the product detailed. This field has a limit of 250 characters. |

Linking Samples Dropped Information to Calls

You can link samples dropped information to calls in one of the following ways:

- By adding samples dropped information to a parent call
- By adding attendees to the parent call and then adding the samples dropped information for each individual attendee record

  You add attendees to a parent account call so that the products detailed, samples dropped, sample request, and promotional item information can be tracked for each individual who attends the meeting.

The following procedure describes how to link samples dropped information to a call record.

Before you begin. To drop off samples during a sales call, your user role must include the Enable Basic Samples Operations privilege.

To link samples dropped information to a call record

1 On the Call Detail or Attendee Detail page, scroll down to either the Available Samples for Drop section or the Samples Dropped section and do one of the following:

NOTE: If the section that you want is not visible on your page, click the Edit Layout link in the upper-right corner of the page, and add the section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

■ In the Available Samples for Drop section, enter the required information in the Quantity field.

Only products of category type Samples Dropped that are not blocked for a primary contact and that have been allocated to and are present in the sales representative's inventory are visible in the available samples list to link to the call record.

■ In the Samples Dropped section, click New and enter the required information on the Samples Dropped Edit page.

NOTE: If your company administrator has set the Enable Filtering of Product Selection by Sales Rep Allocation setting, then only the products that are allocated to the sales representative appear in the Product selector. For more information, see Setting Up Picklist Filtering Based On the Allocation Records for a Sales Representative.

NOTE: The samples dropped fields are copied to the new record when you create a new call record from a smart call template *except* for Lot number (#).

To access the Attendee Detail page, go to the Attendees section on the Call Detail page, and open the attendee record that you want.

The following table describes some of the fields.

Field	Description
Key Sample Dropped Information	
Product Category	(View only) The product category that the product administrator defined at the company. For example, it can be one of the following: ■ Samples Dropped ■ Promotional Item Dropped ■ Products Detailed
Product	(Required) The name of the product sample (for example, a new drug on the market), dropped off to the contact. Select the item, using the Lookup selector. For information on setting up products, see Setting Up Company Products and Product Fields (on page 661). Only products of the category type Samples Dropped, Promotional Item Dropped, Products Detailed, or Sample Request Item that meet the following conditions can be linked to a call record: ■ The products are not blocked for a primary contact. ■ The products have been allocated to the sales representative, and the company administrator has set the Enable Filtering of Product Selection by Sales Rep Allocation setting. For more information, see Setting Up Picklist Filtering Based

Field	Description
	On the Allocation Records for a Sales Representative.
	■ The products are active on the current call date.
Lot #	The lot number for the sample product selected.
	NOTE: This field is relevant only if using lot numbers to track samples in the inventory. When adding or updating a sample drop record, only sample lots that have the Inventory by Lot check box selected can be entered in this field. For more information, see Sample Lots (on page 672) and Sample Lot Fields (on page 675).
Quantity	The number of sample items dropped off to the contact. The quantity must be a number from 1 to 9998. A warning message will appear if you do one of the following:
	■ Enter a value that exceeds the value in the Max Per Call field.
	■ Enter a value that exceeds or is within 10% of the maximum quantity of product allowed to drop off to a contact within the allocation period.
Max Per Call	(View only) The maximum quantity of product that you are allowed to drop off for a call.
Max Per Allocation	(View only) The maximum quantity of product that you are allowed to drop off within the allocation period.
Calculated Sum of Quantity Allocation	(View only) The total quantity of product dropped off so far during the allocation period.

1 Save the record.

Provided that all of the following conditions are true when you click Save, then Oracle CRM On Demand generates a Disbursement transaction with a line item for each dropped sample for the call and submits the disbursement transaction to update the sample inventory. If the disbursement transaction is successful, then Oracle CRM On Demand changes the status of the call to Submitted.

■ All samples exist in the sample inventory for the period indicated by the date and time of the call.

■ The period in which the samples are recorded is an unreconciled period. An error message appears if it is a reconciled period.

■ A valid lot number is specified for dropped samples that are tracked by lot numbers.

■ The quantity value that you enter is not greater than the maximum quantity allowed to drop for a call.

■ The maximum quantity allowed to drop during the allocation period is not exceeded when you enter the quantity value.

2 Repeat steps 1-2 to add more sample dropped line items to the call record.

3 When ready, click Submit to submit the call detail information for processing.

For information, see Submitting Call Detail Information for Inventory Tracking.

Linking Promotional Item Information to Calls

You can link promotional item information to calls in one of the following ways:

- By adding promotional item information to a parent call

- By adding attendees to a parent call and then adding the promotional item information for each individual attendee record

  You add attendees to a parent account call so that the products detailed, samples dropped, sample request, and promotional item information can be tracked for each individual who attends the meeting.

The following procedure describes how to link promotional items, educational items, or other marketing items to a call record.

Before you begin. To drop off promotional items during a sales call, your user role must include the Enable Basic Samples Operations privilege.

To link promotional items, educational items, or other marketing items to a call record

1   On the Call Detail or Attendee Detail page, scroll down to either the Available Promotional Items for Drop section or the Promotional Items section and do one of the following:

    NOTE: If the section that you want is not visible on your page, then click the Edit Layout link in the upper-right corner of the page, and add the section to your page layout. If the section is not available to add to your page layout, then contact your company administrator.

    - In the Available Promotional Items for Drop section, enter the required information in the Quantity field.

      Only products of category type Promotional Item Dropped that are not blocked for a primary contact and that have been allocated to and are present in the sales representative's inventory are visible in the available promotional items list to link to the call record.

    - In the Promotional Items section, click New, and enter the required information on the Promotional Item Dropped Edit page.

      NOTE: If your company administrator has set the Enable Filtering of Product Selection by Sales Rep Allocation setting, then only the products that are allocated to the sales representative appear in the Product selector. For more information, see Setting Up Picklist Filtering Based On the Allocation Records for a Sales Representative.

    For information on the promotional item fields, see the table of field descriptions at the end of this procedure.

    To access the Attendee Detail page, go to the Attendees section on the Call Detail page, and open the attendee record that you want.

    NOTE: The Promotional Item fields are copied to the new record when you create a new call record from a smart call template.

2   Save the record.

    Provided that all of the following conditions are true when you click Save, then Oracle CRM On Demand generates a disbursement transaction with a line item for each sample promotional item dropped for the call, and it submits the disbursement transaction to update the sample inventory. If

the disbursement transaction is successful, then Oracle CRM On Demand changes the status of the call to Submitted.

- All sample promotional items exist in the sample inventory for the period indicated by the date and time for the call.

- The period in which the sample promotional items are recorded is an unreconciled period. An error message appears if it is a reconciled period.

- A valid lot number is specified for the dropped sample promotional items that are tracked by lot numbers.

- The quantity value that you enter is not greater than the maximum quantity that you are allowed to drop for a call.

- The maximum quantity that you are allowed to drop during the allocation period is not exceeded when you enter the quantity value.

3 Repeat steps 1-2 to add more promotional item line items to the call record.

4 When ready, click Submit to submit the call detail information for processing.

For information, see Submitting Call Detail Information for Inventory Tracking.

Field	Description
Key Promotional Items Dropped Information	
Product	(Required) The name of the promotional item (for example, a pen or golf ball) or educational item (for example, a white paper or a manual), dropped off to the contact. Select the item, using the Lookup selector. For information on setting up products, see Setting Up Company Products and Product Fields (on page 661). Only products of the category type Samples Dropped, Promotional Item Dropped, Products Detailed, or Sample Request Item that meet the following conditions can be linked to a call record: - The products are not blocked for a primary contact. - The products have been allocated to the sales representative, and the company administrator has set the Enable Filtering of Product Selection by Sales Rep Allocation setting. For more information, see Setting Up Picklist Filtering Based On the Allocation Records for a Sales Representative. - The products are active on the current call date. **NOTE:** After Release 22, the Lookup selector for the Product field searches for products rather than allocations as in the earlier releases.
Product Category	(View-only) The product category that the company administrator defines. For example, it can be one of the following: - Samples Dropped - Promotional Item Dropped - Products Detailed

Field	Description
Call Date	(View-only) The date of the customer call.
Quantity	The number of promotional or educational items dropped off to the contact. The quantity must be a number from 1 to 9998. A warning message is displayed if you do one of the following: ■ Enter a value that exceeds the value in the Max Per Call field. ■ Enter a value that exceeds or is within 10% of the maximum quantity of product that you are allowed to drop off to a contact within the allocation period.
Max Per Allocation	(View-only) The maximum quantity of promotional items that you are allowed to drop off during the allocation period.
Max Per Call	(View-only) The maximum quantity of promotional items that you are allowed to drop off for a call.
Calculated Sum of Quantity Allocation	(View-only) The total quantity of promotional items dropped off so far during the allocation period.

Linking Sample Request Information to Calls

You can link sample request information to calls in one of the following ways:

■ By adding sample request information to a parent call

■ By adding attendees to a parent call and then adding the sample request information for each individual attendee record

   You add attendees to a parent account call so that the products detailed, samples dropped, sample request, and promotional item information can be tracked for each individual who attends the meeting.

   NOTE: You can also use the Order pages to create and update order items for products. If you customise the Order Detail page by adding a new field, then the new field will also be available on the Sample Request page. For more information about order items, see Creating an Order Item for Products (on page 728).

The following procedure describes how to link sample request information to a call record.

NOTE: In releases of Oracle CRM On Demand prior to Release 22, it was possible to insert a sample request item record without using an associated parent sample request record when using Web services or the Import function. However, from Release 22, when you are inserting sample request item records by using Web services or the Import function, you must provide the sample request ID of the parent sample request to provide the context for the sample request item. From the Oracle CRM On Demand user interface, you can create a sample request item only from a parent sample request in the context of a call. In addition, product-blocking rules are not followed when sample request items are inserted or updated using Web services or the Import function.

NOTE: Processing blocked products is not supported for sample request items when workflows are used in Oracle CRM On Demand. For more information, see About Sample Request Item Workflows and Blocked Product Rules (on page 737).

Before you begin. To request samples during a sales call, your user role must include the Enable Basic Samples Operations privilege.

To link sample request information to a call record

1 On the Call Detail or Attendee Detail page, click New in the Sample Request section.

   To access the Attendee Detail page, go to the Attendees section on the Call Detail page, and open the attendee record that you want.

   NOTE: If the section that you want is not visible on your page, click the Edit Layout link in the upper-right corner of the page, and add the section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

2 On the Sample Request Edit page, enter the required information for the sample request.

   For information on the sample request fields, see Sample Request Fields (on page 690).

3 Save the Sample Request record.

4 On the Sample Request Detail Page, go to the Sample Request Items section.

   NOTE: If the section that you want is not visible on your page, click the Edit Layout link in the upper-right corner of the page, and add the section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

5 In the Sample Request Item section:

   a Click New to add a sample request item for each requested product sample.

      NOTE: If your company administrator has set the Enable Filtering of Product Selection by Sales Rep Allocation setting, then only the products that are allocated to the sales representative appear in the Product selector. For more information, see Setting Up Picklist Filtering Based On the Allocation Records for a Sales Representative.

   b In the Sample Request Item Edit page, enter the required information for the sample request item.

      The table at the end of this procedure provides additional information regarding some fields for a sample request item.

   c Save the sample request item record.

   d Add additional sample request items as required.

6 Repeat steps 1-5 to add more sample request line items to the call record.

7 When ready, click Submit to submit the call detail information for processing.

   For more information, see Submitting Call Detail Information for Inventory Tracking.

Field	Description

Field	Description
Order Item Number	(Required) A numeric field representing an order item.
Quantity	(Required) The number of samples requested. This must be a non-zero positive integer. Oracle CRM On Demand displays a warning message if you enter one of the following: ■ A value that exceeds the value in the Max Qty field in your Allocation record. ■ A value that exceeds or is within 10% of the Max Qty per Customer field in your Allocation record.
Product	(Required) The name of the product. Select the check box next to each product that you want to request. For information on setting up products, see Setting Up Company Products and Product Fields (on page 661). Only products of the category type Samples Dropped, Promotional Item Dropped, Products Detailed, or Sample Request Item that meet the following conditions can be linked to a call record: ■ The products are not blocked for a primary contact. ■ The products have been allocated to the sales representative, and the company administrator has set the Enable Filtering of Product Selection by Sales Rep Allocation setting. For more information, see Setting Up Picklist Filtering Based On the Allocation Records for a Sales Representative. ■ The products are active on the current call date.
Order	(Required) This field specifies the parent order for the sample request. By default this field is read-only, but it can be customised as not read-only. For information on customisation, see *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.
Additional Information	

Field	Description
Status	(Required) The default value for this field is Pending. When you submit a sample request order for products, the value in this field changes to Submitted. The possible values for this field are:

■ New

■ Open

■ Booked

■ In-transit

■ Partially Received

■ Partially Shipped

■ Pending

■ Shipped

■ Billed

■ Paid

■ Installed

■ Closed

■ Cancelled

■ Hold

■ Jeopardy

■ Actual

■ Approved

■ Projected

■ Rejected

■ Awaiting Approval

■ Complete

■ Submitted

■ -

■ Picked

■ Credit Failure

■ Event Check

■ Failed

■ Back Ordered

■ In Progress

■ Processed

■ Received

■ Signed

■ Voided

Saving Call Detail Information as a Template

The following procedure describes how to save call detail information as a template.

To save the call detail information as a template

■ On the Call Detail page, click the appropriate button:

■ **Save as Private Smart Call.** Restricts the template for your use only.

■ **Save as Public Smart Call.** Adds the template to the list for others to use.

NOTE: Each time you click the button, the record is saved as a separate smart call. Oracle CRM On Demand remains open on this page.

Submitting Call Detail Information for Inventory Tracking

The following procedure describes how to submit call detail information for inventory tracking.

NOTE: If the call record does not contain a valid contact state licence or an associated signature record, and the validation checks for these conditions have been set up by your administrator on the Life Science Related Preferences page, then Oracle CRM On Demand displays an error message and prevents the call submission. For information on the relevant preferences, see the information on Enable Contact State Licence Validation and Enable Signature Validation in Setting Life Sciences Related Preferences.

About Submitting Attendee Call and Account Calls

In releases of Oracle CRM On Demand before Release 24, if you submitted attendee call information, then Oracle CRM On Demand did not permit you to submit related account call information, and the account call remained in an ambiguous state regardless of whether the account call contained inventory items and a valid signature. However, in Release 24, the account call submission feature has been enhanced as follows:

■ You can submit an account call regardless of the status of any associated attendee call.

■ Even if an account call is already marked as Submitted, then clicking Submit on the Call Detail page does not result in an error, and Oracle CRM On Demand continues to check the child attendee calls and submits them if they have not been submitted already.

■ If an account call is not marked as Submitted, then clicking Submit in the Call Detail page submits that account call and all the associated attendee calls that are not in Submitted status without generating an error.

■ If the account call and all the attendee calls are marked as Submitted, and if you click Submit on the Call Detail page, then Oracle CRM On Demand does not generate an error, but it does not continue with call processing so that duplicate records are not created.

To submit the Call Detail information for inventory tracking

■ When all of the information has been entered and saved on the Call Detail page, click Submit to submit the call detail information for processing.

When you click Submit, a disbursement transaction is created recording the samples or promotional items that have been dropped off, and the following happens:

- The status of the account call changes to Submitted.

- The sales representative's sample inventory is reduced according to the promotional items and samples dropped off on the call.

  NOTE: Sample request orders do not affect the sample inventory.

- The sample request orders are submitted.

- The account call is closed.

- You can only view the account call details.

About Electronic Signatures

Oracle CRM On Demand can store signature data securely, in image format, for dropped samples. Signature images are stored in Oracle CRM On Demand, using standard image formats. The signature image is a series of x- and y-coordinates or strings, which can be stored in the Oracle CRM On Demand database.

Each call activity recorded for samples that are dropped during a sales call must have an associated signature image. It is the responsibility of the sales representative who is dropping the samples to obtain an electronic signature from the person (or company) who receives the samples. The signature can be captured on paper or by an external application (such as a mobile handheld device), and then uploaded to Oracle CRM On Demand through the Web services interface. The sales representative must capture the signature when the samples are dropped. The sales representative cannot deliver the samples without capturing an authorised signature.

Administrators and authorised users can view sample signature images on the Signature Detail page, but they cannot create, update, or delete them. The Signature Detail page lists the four most recently captured signatures for samples dropped. Sample administrators must regularly check the signature images on the Signature Detail page to make sure that the signatures collected from each contact are consistent.

NOTE: Access to the sample signature image is controlled so that only designated roles can access and view sample signature images. Only those roles that have been authorised to receive samples and assigned the Enable Basic Samples Operations privilege can access and view signature images.

Checking Electronic Signatures

Use the following procedure to check the signature associated with a call activity for samples that are dropped. This procedure assumes that the Signature record type is exposed as a related item on the Call Detail page. For more information about exposing related item information, see Customising Related Item Layouts.

Access to the actual sample signature image is controlled so that only designated roles can access and view sample signature images. Only roles that are authorised to receive samples will be able to access and view signature images. For more information, see Authorising Contacts to Receive Samples.

For more information about signatures, see About Electronic Signatures (on page 650).

Before you begin. To check electronic signatures, your user role must include the Enable Basic Samples Operations privilege and you must be authorised to receive samples.

To check sample signatures

1 On the Contacts Homepage, open the contact that you want.

2 On the Contact Detail page in the Calls section, drill down on the Subject field to open the call activity record that you want.

3 On the Call Detail page in the Signature section, drill down on the Title field to open the sample signature record that you want to view.

 NOTE: You cannot edit an existing signature record, or create a new signature record.

4 On the Signature Detail Page, you can do the following:

 ■ Review the details of the signature.

 ■ Edit the signature record by attaching a file or removing a file from the record. For more information, see the Attachment field in the following table.

 ■ Retrieve and view any attachment file that has been associated with the signature record. For more information, see the Attachment field in the following table.

 The following table provides information regarding some of the fields on the Signature Detail page.

Field	Description
Signature Header	The Signature Header field displays the following information: ■ **Contact Last Name.** The last name of the recipient of the samples. ■ **Contact First Name.** The first name of the recipient of the samples. ■ **Signature Date.** The date that the samples were dropped and the date on which the authorised signature was captured. ■ **Address.** The address of the recipient who receives the samples. ■ **Sales Rep First and Last Name.** The first and last name of the sales representative who dropped the samples.
Disclaimer Text	The Disclaimer Text field displays the disclaimer text that is associated with the dropped samples. You cannot edit, insert, or delete any portion of the disclaimer text. The disclaimer text is created by using a synchronisation process for Web services from an offline client, such as an iPad or mobile device. This field includes the full disclaimer text in the language specified for the disclaimer, and it displays the exact text viewed by physicians when they sign for the receipt of samples. For more information on sample disclaimers, see Sample Disclaimers (on page 676).

Field	Description
Signature Control	Click this button to access the signature image, which displays the following information: ■ **Sample Signature System ID.** The unique identifier associated with the sample signature. ■ **Activity ID.** The unique identifier of the call activity record with which the sample signature is associated. ■ **Call Date.** The date that the samples were dropped and the date on which the authorised signature was captured. ■ **Disclaimer Text.** The disclaimer text associated with the dropped samples. **NOTE:** Your user role must include the Signature privilege to open and view the signature captured when samples were dropped. If you have not been granted the Signature privilege, then the Signature Control button is disabled.
Attachment	If this field is displayed on the page, then you can attach a file to the sample transaction record. The field initially shows a paper clip icon on the record Edit page: 📎 You can attach a file to the sample transaction record by clicking the paper clip icon on the record Edit page and then selecting the file that you want to upload. After the file is uploaded and the record is saved, the Attachment field on the record Detail page shows the name and size of the attachment file. On the record Edit page, the field also shows the paper clip icon and an X icon that can be used to remove the file. For information on attaching files to records, using the Attachment field, and information about the restrictions on file sizes and file types, see Attaching Files to Records through Attachment Fields (on page 154).

About the Relationship Between Sample Transactions and Sample Inventory

The following table shows the relationship between sample transactions, transaction types, and the impact on the sample inventory for sales representatives.

NOTE: Transfer Out and Inventory Adjustment (samples lost and found) are user-generated transactions. Oracle CRM On Demand generates Disbursement and Transfer In transaction types.

Sample Transaction Record	Description	Transaction Type	Sample Inventory Impact
Disbursement Transaction	Transactions where the sales representative submits and drops off samples. Oracle CRM On Demand generates disbursement transactions automatically whenever sales representatives drop off samples during sales calls. For more information, see Viewing Disbursement Transactions (on page 628).	Disbursement	Sample transactions of type Disbursement are subtracted from a sales representative's sample inventory.
Received Transaction	Transactions where the sales representative receives samples. Users must acknowledge the receipt of samples. For more information, see Acknowledging Receipt of the Sample Inventory (on page 614).	Transfer In	Sample transactions of type Transfer In are added to a sales representative's sample inventory.
Sent Transaction	Transactions in which the sales representative transfers samples to another user or sends unused samples to headquarters. For more information, see Creating a Samples Transfer (on page 624).	Transfer Out	Sample Transactions of type Transfer Out are subtracted from a sales representative's sample inventory.
Adjustment Transaction	Transactions created by the sales representative to reconcile discrepancies between the physical counts of samples and records in Oracle CRM On Demand. For more information, see Adjusting Sample Transactions (on page 626).	Inventory Adjustment	Sample Transactions of type Inventory Adjustment are added or subtracted from a sales representative's inventory as required. For example: Sample transactions of type Inventory Adjustment and with an adjustment reason of Found are added to a sales representative's sample inventory. In this case, the value in the Quantity field for the transaction item is treated as a positive number.
Lost Transaction	Transactions created by the sales representative to record samples that have been lost. Lost sample transactions are	Inventory Adjustment, with a reason of Lost	Sample transactions of type Inventory Adjustment and with an adjustment reason of Lost are subtracted from a sales

Sample Transaction Record	Description	Transaction Type	Sample Inventory Impact
	submitted as adjustments. For more information, see Creating Lost and Found Sample Transactions (on page 628).		representative's sample inventory. In this case, the value in the Quantity field for the transaction item is treated as a negative number.

Monitoring Sample Activities

The samples administrator is responsible for the samples inventory of the company and making sure that it complies with regulatory rules and regulations.

Before you begin. To monitor sample activities, your user role must be assigned administrative responsibilities and must include the following privileges:

- Enable Basic Samples Operations privilege
- Enable Samples Adjustment privilege

To monitor samples activities, click the list that you want to monitor in the Sample Transaction List section on the Sample Transaction Homepage. The following table describes the purpose of each list.

Sample Transaction List	Filters
Disbursement Transactions	Shows all samples that were submitted and dropped. Monitoring this list allows the samples administrator to review all samples that have been dropped.
Sent Transactions	Shows all samples that were submitted and transferred. Monitoring this list allows the samples administrator to review all samples returned or shipments transferred between end users.
Received Transactions	Shows all samples that were submitted and received. Monitoring this list allows the samples administrator to review received shipments between end users.
Adjustment Transactions	Shows all adjustment transactions that have been submitted. Monitoring this list allows the samples administrator to review all types of adjustment transactions that have been submitted by end users and samples administrators to reconcile discrepancies between physical counts and records in Oracle CRM On Demand.
Lost Transactions	Shows all lost samples that were submitted as adjustments. Monitoring this list allows the administrator to review the samples that have been lost.

For information on viewing or creating these lists, see Working with Lists (on page 112) and Creating and Refining Lists (on page 118).

To view a list, click the list name.

To create a new list, click New.

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Sample Transaction Fields

Use the Sample Transaction Edit page to add a sample transaction, or update details for an existing sample transaction that has a status of In Progress. The Sample Transaction Edit page shows the complete set of fields for a sample transaction.

TIP: You can also edit sample transactions on the Sample Transaction List page and the Sample Transaction Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the sample transaction fields. Depending on the type of sample transaction that you have open (Transfer In, Transfer Out, Inventory Adjustment, Disbursement, Samples Lost), all of these fields might not be applicable.

Field	Description
Key Transaction Information	
Name	The unique identifier of the sample transaction (this is system generated).
Date	The date for the sample transaction.
	When you enter a date that falls within an active inventory period, the Inventory Period: Start Date and Inventory Period: End Date fields are automatically populated. An error message is displayed if you enter a date that does not fall within any existing inventory periods. You can enter a date that is in the future if Allow Submission of Future Calls & Sample Transaction is set by your administrator. For more information, see Setting Life Sciences Related Preferences.
	NOTE: If you submit a future call to start a transaction, then Oracle CRM On Demand associates the sample transaction record with the active inventory period. The sample transaction remains associated with the current active inventory period, even if you close the inventory period before the date of the future call. The sample transaction is not associated with the more current inventory period.
	Sample transactions cannot be created for reconciled periods. Oracle CRM On Demand displays an error message if you enter a date that falls within a reconciled period or an inactive period.

Field	Description
Type	The type of sample transaction can be one of the following: ■ Transfer Out ■ Inventory Adjustment ■ Samples Lost ■ Sample Request ■ Disbursement ■ Transfer In Transfer Out, Inventory Adjustment, Samples Lost, and Sample Request are user generated transactions; Disbursement and Transfer In are system generated transactions. **NOTE:** It is critical that you do not customise or change the order of the Type picklist for Sample Transaction Field Set-up as the cascading picklist functionality may be affected.
Status	The status of the sample transaction can be one of the following: ■ In Progress ■ Submitted ■ Processed with Discrepancies ■ In Transit ■ Processed ■ Adjusted
Expected Delivery Date	The date that the sample is due to be delivered.
Tracking #	A unique number that you and the customer can use to track the delivery of the sample.
# of Packages Sent	The number of packages that are included in the sample.
Transfer To	The person to whom a transfer out transaction is logged. This person receives the sample and must acknowledge receipt of the sample. When creating a transfer out transaction, this is a required field.
Transfer From	The person who is transferring the samples (that is, the person who creates the Transfer Out transaction).
Inventory Period: Start Date	The start date of the inventory period associated with the sample transaction. This is a read-only field, which is automatically populated only when the date that you enter in the Date field falls within an active inventory period. The inventory period restricts the products and sample lot numbers that are available for selection when adding Transaction Item line items. It also ensures that for the selected inventory period, only valid products and sample lot numbers

Field	Description
	are available for selection.
Inventory Period: End Date	The end date of the inventory period associated with the sample transaction. This is a read-only field, which is automatically populated only when the date that you enter in the Date field falls within an inactive inventory period.

The inventory period restricts the products and sample lot numbers that are available for selection when adding Transaction Item line items. It also ensures that for the selected inventory period, only valid products and sample lot numbers are available for selection. |
| Adjustment Reason | The reason for creating or adjusting the sample transaction. Reason codes include the following:

■ Lost

■ Found

■ Theft

■ Human Error

■ Initial Count

■ Request |
| Comments | The user can enter additional information about the sample transaction in this field. |
| Attachment | If this field is exposed on the page, you can attach a file to the sample transaction record. The field initially shows a paper clip icon on the record Edit page:

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You can attach a file to the sample transaction record by clicking the paper clip icon on the record Edit page and then selecting the file that you want to upload.

After the file is uploaded and the record is saved, the Attachment field on the record Detail page shows the name and size of the attachment file. On the record Edit page, the field also shows the paper clip icon and an X icon that can be used to remove the file.

You can attach only one file to each sample transaction record.

For instructions on attaching files to records through the Attachment field, and information about the restrictions on file sizes and file types, see Attaching Files to Records through Attachment Fields (on page 154). |

Key Contact Information

NOTE: This read-only information is populated for disbursement transactions only. Oracle CRM On Demand automatically generates disbursement transactions whenever sales representatives drop or disburse samples during a sales call. For more information, see Dropping Samples During a Sales Call (on page 630) and Viewing Disbursement Transactions (on page 628).

Field	Description
Contact	The full name of the physician or hospital contact to whom the disbursement was made.
Contact First Name	The first name of the contact to whom the disbursement was made.
Contact Last Name	The last name of the contact to whom the disbursement was made.
Contact Type	The contact type.
Contact Account	The account associated with this contact.
Contact Email	The email address for this contact.

Related Information

See the following topics for related, sample transaction information:

- Sample Transactions (on page 620)
- Working with the Sample Transaction Homepage (on page 620)
- Managing Sample Transactions (on page 623)

Transaction Items

Use the Transaction Item pages to create, update, and track transaction items for samples.

A *transaction item* records the details of the sample or promotional items associated with a sample transaction. For each sample transaction, one or more transaction item line items must exist. This information is used to calculate a running count of inventory for the sales representative. Sample transactions are used in the reconciliation process to account for all samples and promotional items that have been assigned to a sales representative.

Managing Transaction Items

For step-by-step procedures for managing transaction items, see:

- Modifying the Sample in a Transaction Item (on page 659)
- Modifying the Sample Lot in a Transaction Item (on page 659)
- Adding Transaction Items to a Sample Transaction (on page 629)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 103)
- Linking Records to Your Selected Record (on page 104)
- Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

■ Transaction Items (on page 658)

■ Transaction Item Fields (on page 660)

■ Product Fields (on page 661)

Modifying the Sample in a Transaction Item

Use the Product Edit page to modify the sample in a transaction item. The Product Edit page shows the complete set of fields for a product.

Before you begin. To modify samples in a transaction item, your user role must include the Enable Basic Samples Operations privilege.

To modify the sample in a transaction item

1 On the Sample Transaction List page, drill down on the Name field to open the transaction record that you want.

   NOTE: The transaction record that you open must have a status of In Progress. Transactions that have a status of Submitted cannot be modified.

2 On the Sample Transaction Detail page, go to the Transaction Item line item that you want to modify.

3 In the Sample field of the Transaction Item line item, click the Lookup icon to select a different sample to associate with the Transaction Item line item, if required.

4 In the Sample field of the Transaction Item line item, click the name of the sample, click Edit on the Product Details page, and then modify the fields as required.

   For more information, see Product Fields (on page 661).

Modifying the Sample Lot in a Transaction Item

Use the Sample Lot Edit page to modify the sample lot in a transaction item. The Sample Lot Edit page shows the complete set of fields for a sample lot.

Before you begin. To modify sample lots in a transaction item, your user role must include the Enable Basic Samples Operations privilege.

To modify the sample lot in a transaction item

1   On the Sample Transaction List page, drill down on the Name field to open the transaction record that you want.

   NOTE: The transaction record that you open must have a status of In Progress. Transactions that have a status of Submitted cannot be modified.

2   On the Sample Transaction Detail page, go to the Transaction Item line item that you want to modify.

3   In the Lot # field of the Transaction Item line item, click the Lookup icon to select a different sample lot to associate with the Transaction Item line item, if required.

   NOTE: Only sample lots that are being tracked by lot number in the inventory (that is, sample lots that have the Inventory by Lot check box selected) are available for selection.

4   In the Lot # field of the Transaction Item line item, click the name of the sample lot, click Edit on the Sample Lot Detail page, and then modify the sample lot fields as required (see Sample Lot Fields (on page 675) for more information).

Transaction Item Fields

Use the Transaction Item Edit page to add a transaction item or update details for an existing transaction item.

TIP: You can also edit transaction items on the Transaction Item Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the transaction item fields.

Field	Description
Line Number	A unique number that is assigned manually to each item.
Sample	The name of the sample or promotional item.
Lot #	The unique number or name assigned to the sample for tracking purposes. A sample might or might not be tracked by a lot number. This field is optional.
	NOTE: When adding or updating a transaction item, click the Lookup icon to select a sample lot. Only sample lots that are being tracked by lot number in the inventory (that is, sample lots that have the Inventory by Lot check box selected) are available for selection. For more information about sample lots, see Sample Lots (on page 672) and Sample Lot Fields (on page 675).
Quantity	The quantity of the sample. This field is required.
	NOTE: If the quantity value is less than the initial quantity of sample inventory transferred from headquarters, then use the minus sign with the numeric value. This field

Field	Description
	is important for recording adjustments such as loss, theft, or human error.

Related Topics

See the following topics for related information about transaction items:

■ Transaction Items (on page 658)

■ Managing Transaction Items (on page 658)

■ Adding Transaction Items to a Sample Transaction (on page 629)

Product Fields

Use the Product Edit page to define and manage your company's list of products. The Product Edit page shows the complete set of fields for a product. For information about setting up products for your company, see Setting Up Company Products.

TIP: You can also edit products on the Product Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the product fields.

Field	Description
Key Product Information	
Product Name	The name of the product.
Product Category	The product category, as defined by product administrator at the company. For example, it can be one of the following: ■ Samples Dropped ■ Promotional Item Dropped **NOTE:** Do not change the seed data for the product category. Some filters in Oracle CRM On Demand have been created for Samples Dropped and Promotional Item Dropped. You can add new product categories, which are based on your customer requirements.

Field	Description
Solution	The product image file associated with this product. The image file is used to describe the product during a sales call. **NOTE:** This field is available with Oracle CRM On Demand Life Sciences Edition and might not be available for your configuration. If you require this field and it is not available, contact your company administrator.
Part #	The manufacturer part number associated with the product. The company specifies the part number.
Orderable	A check box to indicate how the sample product can be ordered: ■ If selected, the sample product can be ordered by the sales representative and can be shipped from the company to the physician, clinic, or hospital. ■ If not selected, the sample can be obtained only when the sales representative makes a sample drop.
Type	The type of product can be one of the following: ■ **Product.** A physical item manufactured by the customer. ■ **Service.** A value added event that provides a service to the customer - could include such items as consulting time. ■ **Training.** A value added event that provides education to the customer - includes such items as labs, manuals, hands on training, lectures, and so on.
Status	The company defines the product status. The values include the following: ■ **Available.** The product is available for sample transfers and sample drops. ■ **Active.** There are active sample transfers and drops for this product. ■ **Pending.** The product is not ready to be dropped but is in the process of being made available. ■ **Bundle.** A group of products or services have been packaged together and are dependent on each other. ■ **Prototype.** The product is not ready for general availability but an example of the product can be examined or studied. ■ **Terminated.** The product is no longer available for sample transfers and sample drops and will not be available in the future. ■ **Closed.** This means the same as Terminated, except that the product will be available until there is no product left to transfer or drop.
Additional Information	
Description	A description of the product sample.

Allocations

Use the Allocation pages to create, update, and track allocations for a sample.

The samples administrator of a pharmaceutical company defines an allocation record. This allocation record determines the period in which sample products are given to the sales representative to distribute to clinics, hospitals, or physician contacts. Additionally, the allocation information defines the following:

■ The number of samples of a particular product that is allowed to be dropped at a particular time

■ The maximum number of samples that a sales representative is allowed to distribute to a given location

This feature allows the samples administrator to set those parameters at the product level and communicate this information to all the sales representatives. Using allocations, you can define the allocation period, allocate samples within that allocation period, view the list of samples available for each allocation period, and set the maximum parameters for distributing that sample during that allocation period.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking allocation information, the Allocation tab might be excluded from your setup.

Working with the Allocation Homepage

The Allocation Homepage is the starting point for managing allocations.

NOTE: Your company administrator can customise the layout of your Allocation Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Before you begin. To work with allocations, your user role must include the Enable Basic Samples Operations privilege.

Creating an Allocation

The samples administrator creates a new allocation by clicking the New button in the Recently Modified Allocations section. For more information, see Creating Records (on page 51) and Allocation Fields (on page 666).

Working with Allocation Lists

The Allocation List section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for allocations.

Allocation List	Filters
All Allocations	All allocations to which you have visibility, regardless of who owns the allocation.

Allocation List	Filters
Recently Modified Allocations	All allocations with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Allocations

The Recently Modified Allocations section shows the allocations that were modified most recently.

Click Show Full List to expand the list.

Adding Sections to your Allocation Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Allocation Homepage:

- Recently Created Allocations

- Recently Modified Allocations

- My Recently Created Allocations

- My Recently Modified Allocations

- Additional report sections (Your company administrator can make report sections available for display on your Allocation Homepage.)

To add sections to your Allocation Homepage

1 On the Allocation Homepage, click Edit Layout.

2 On the Allocation Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page. Click Save.

Related Topics

See the following topics for related information about allocations:

- Allocations (on page 663)

- Allocation Fields (on page 666)

- Managing Allocations (on page 665)

Managing Allocations

For step-by-step procedures for managing allocations, see:

- Allocating Samples to End Users (on page 665)

- Modifying the Sample in an Allocation (on page 666)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)

- Updating Record Details (on page 103)

- Linking Records to Your Selected Record (on page 104)

- Working with Lists (on page 112)

- Viewing Audit Trails for Records (on page 164)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about allocations:

- Allocations (on page 663)

- Working with the Allocation Homepage (on page 663)

- Allocation Fields (on page 666)

Allocating Samples to End Users

Use the Allocation Detail page to allocate samples to an end user.

For adding multiple allocation records, it is recommended that the samples administrator create an import file (mapping end users to product allocations), and then load the data into Oracle CRM On Demand.

Before you begin. To allocate samples to end users, your user role must include the Enable Basic Samples Operations privilege.

To allocate samples to an end user

1 On the Allocation List page, drill down on the Allocation Type field to open the allocation record that you want.

2 On the Allocation Detail page, click the Lookup icon beside the Owner field, and select the end user. Click Save.

Modifying the Sample in an Allocation

Use the Product Edit page to modify the sample in an allocation. The Product Edit page shows the complete set of fields for a product.

Before you begin. To modify the sample in an allocation, your user role must include the Enable Basic Samples Operations privilege.

To modify the sample in an allocation

1   On the Allocation List page, drill down on the Allocation Type field to open the allocation record that you want to modify.

2   On the Allocation Detail page in the Sample field, click the Lookup icon to select a different sample to associate with the allocation record, if required.

3   On the Allocation Detail page in the Sample field, click the name of the sample, click Edit on the Product Details page, and then modify the fields as required (see Product Fields (on page 661) for more information).

Allocation Fields

Use the Allocation Edit page to add an allocation or update details for an existing allocation. The Allocation Edit page shows the complete set of fields for an allocation.

TIP: You can also edit allocations on the Allocation List page and the Allocation Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the allocation fields.

Field	Description
Allocation Type	The allocation name is defined by the samples administrator. It must be unique. Some examples include: ■ Sample Allocation ■ Promotional Item Allocation
Active	The status of the allocation can be one of the following: ■ **Active.** Indicates that the end date for the allocation period has not yet occurred. ■ **Inactive.** Indicates that the allocation period has completed and the end date has been reached.

Field	Description
Owner	The owner of the allocation record. This is the person to whom the samples administrator assigns the allocation.
Sample	The product sample associated with this allocation. **NOTE:** When creating a new allocation record, only products that are categorised as samples (that is, products of the category type, Samples Dropped) can be entered in this field.
Max Qty	The maximum quantity of product allowed to be dropped off for a call. **NOTE:** When dropping off samples or promotional items, a warning message will appear if you exceed or are nearing the Max Qty value.
Allocation Qty	The maximum quantity of product allowed to be dropped off within the allocation period.
Max Qty Per Customer	The maximum quantity of product allowed to be dropped off to a contact within the allocation period. **NOTE:** When dropping off samples or promotional items to a contact, a warning message will appear if you exceed or are within 10% of the Max Qty Per Customer value.
Sample: Description	Text field to describe the allocation record, for example, the purpose of the allocation.
Owner: First Name	The first name of the owner of the allocation record, typically the user who created the record.
Owner: Last Name	The last name of the owner of the allocation record, typically the user who created the record.
Start Date	The start date for this allocation.
End Date	The end date for this allocation.
Stop Sampling	A check box to indicate whether to continue delivering samples: ■ If selected, then sample drops are no longer allowed. ■ If not selected, then sample drops are allowed.
Order By	This field allows sales representatives to view their allocations in a specified order.
Additional Fields:	
NOTE: Your company administrator must configure the following fields because they are not available by default.	
Remaining Qty	The quantity of the product that remains available for the sales representative to drop off during the allocation period. Oracle CRM On Demand initializes this field with the Allocation Qty field value.

Field	Description
Distributed Qty	The quantity of the product that has been distributed by a sales representative to a contact during the allocation period. Oracle CRM On Demand initializes this field with the value of zero (0).

Related Topics

See the following topics for related information about allocations:

- Allocations (on page 663)

- Working with the Allocation Homepage (on page 663)

- Managing Allocations (on page 665)

HCP Contact Allocations

Use the HCP Contact Allocation pages to specify the maximum quantity of a product or sample that a health care professional (HCP) contact, (for example, a physician) can receive from sales representatives. In contrast, an Allocation record specifies the maximum quantity of a product or sample that an individual sales representative can drop or detail to a contact, within the allocation period. For more information on allocations, see Allocations (on page 663).

HCP contact allocations are typically managed by a samples administrator in a pharmaceutical company. You can work with HCP contact allocations if your user role includes the Enable Basic Samples Operations privilege. For each contact, you can create multiple HCP contact allocation records. For each HCP contact allocation record, you can specify the allocation type, a start date and an end date for the allocation period, and the number of samples of the specified product that can be given to the contact during the allocation period.

Although you can create HCP contact allocation records directly through the HCP Contact Allocation pages to create an individual record, it is recommended that you import the HCP contact allocation records into Oracle CRM On Demand, particularly when you must create a large number of records. For more information on importing HCP contact allocations, see HCP Contact Allocation Fields: Import Preparation.

You can view HCP contact allocations as a view-only related item in a contact record, provided your company administrator has set this up for your company.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking allocations for HCP contacts, then the HCP Contact Allocation tab might be excluded from your setup.

Working with the HCP Contact Allocation Homepage

The HCP Contact Allocation Homepage is the starting point for managing HCP contact allocations.

NOTE: Your company administrator can customise the layout of your HCP Contact Allocation Homepage. In addition, if your user role includes the Personalise Homepages privilege, then you can add sections and remove sections from the page.

Before you begin. To work with HCP contact allocations, your user role must include the Enable Basic Samples Operations privilege.

Creating an HCP Contact Allocation

The samples administrator creates a new HCP contact allocation by clicking the New button in the Recently Modified HCP Contact Allocations section. For more information, see Creating Records (on page 51) and HCP Contact Allocation Fields (on page 671).

NOTE: Although you can create HCP contact allocation records directly through the HCP Contact Allocation pages to create an individual record, it is recommended that you import the HCP contact allocation records into Oracle CRM On Demand, particularly when you must create a large number of records. For more information on importing HCP contact allocations, see HCP Contact Allocation Fields: Import Preparation.

Working with HCP Contact Allocation Lists

The HCP Contact Allocation Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for HCP contact allocations.

HCP Contact Allocation List	Filters
All HCP Contact Allocations	All HCP contact allocations to which you have visibility
Recently Modified HCP Contact Allocations	All HCP contact allocations to which you have visibility, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified HCP Contact Allocations

The Recently Modified HCP Contact Allocations section shows the HCP contact allocations that were modified most recently.

Click Show Full List to expand the list.

Adding Sections to your HCP Contact Allocation Homepage

If your user role includes the Personalise Homepages privilege, then you might be able to add additional report sections to your HCP Contact Allocation Homepage. Your company administrator can make report sections available for display on your HCP Contact Allocation Homepage.

To add sections to your HCP Contact Allocation Homepage

1 On the HCP Contact Allocation Homepage, click Edit Layout.

2 On the HCP Contact Allocation Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page. Click Save.

Related Topics

See the following topics for related information about HCP contact allocations:

- ■ HCP Contact Allocations (on page 668)
- ■ Managing HCP Contact Allocations (on page 670)
- ■ HCP Contact Allocation Fields (on page 671)

Managing HCP Contact Allocations

For step-by-step procedures that are common to many record types, see:

- ■ Creating Records (on page 51)
- ■ Updating Record Details (on page 103)
- ■ Linking Records to Your Selected Record (on page 104)
- ■ Working with Lists (on page 112)
- ■ Viewing Audit Trails for Records (on page 164)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about HCP contact allocations:

- ■ HCP Contact Allocations (on page 668)
- ■ Working with the HCP Contact Allocation Homepage (on page 668)
- ■ HCP Contact Allocation Fields (on page 671)

HCP Contact Allocation Fields

Use the HCP Contact Allocation Edit page to add an HCP contact allocation or to update the details of an existing allocation. The HCP Contact Allocation Edit page shows the complete set of fields for an HCP contact allocation.

TIP: You can also edit HCP contact allocations on the HCP Contact Allocation List page and the HCP Contact Allocation Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the HCP contact allocation fields.

Field	Description
HCP Contact Allocation ID	A unique ID generated by Oracle CRM On Demand for this record.
Type	The type of allocation that you want to create. By default, the following allocation types are available for HCP contact allocations, but your company administrator can add or remove allocation types: ◼ Detail Allocation ◼ Sample Allocation ◼ Sample Request Allocation ◼ Promotional Item Allocation Detail Allocation, Sample Allocation, Sample Request Allocation, and Promotional Item Allocation are designations that users create. They use them for filtering related item sections when managing samples. **CAUTION:** You must not customize or change the order of the Type picklist for HCP Contact Allocation Field Setup because the cascading picklist functionality might be affected.
Product Name	The name of the product sample to be allocated to the HCP contact.
Contact Name	The name of the HCP contact for whom you want to specify the allocation.
Allocation Qty	The total number of samples of a specified product that the HCP contact can receive during the allocation period. When initializing the HCP Contact Allocation record, set the value for the Allocation Qty field to be equal to the Qty Remaining field. Quantity fields must have integer values.
Qty Distributed	The number of samples of the specified product that have already been given to the contact during the allocation period. When the HCP contact allocation is first created, the Qty Distributed field must be zero. Quantity fields must have integer values.

Field	Description
Qty Remaining	The number of samples of the specified product that remain available to be given to the specified HCP contact during the allocation period.
	When initializing the HCP Contact Allocation record, set the value for the Qty Remaining field to be equal to the Allocation Qty field. Quantity fields must have integer values.
Start Date	The start date for this allocation.
End Date	The end date for this allocation.

Related Topics

See the following topics for related information about HCP contact allocations:

■ HCP Contact Allocations (on page 668)

■ Working with the HCP Contact Allocation Homepage (on page 668)

■ Managing HCP Contact Allocations (on page 670)

Sample Lots

Use the Sample Lot pages to create, update, and track sample lots.

A product, as it is being manufactured, is given a lot number. Companies use this lot number to track products. Tracking is essential if a particular product has to be recalled, or if a defect is detected during production. Knowing where all their products are located is critical to many companies. Oracle CRM On Demand provides the option to track the samples being dropped using lot numbers. The samples administrator of a company decides whether to use lot numbers.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking sample lot information, the Sample Lot tab might be excluded from your setup.

Working with the Sample Lot Homepage

The Sample Lot Homepage is the starting point for managing sample lots. This page displays information that is relevant to you.

NOTE: Your company administrator can customise the layout of your Sample Lot Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Before you begin. To work with sample lots, your user role must include the Enable Basic Samples Operations privilege.

Creating a Sample Lot

You can create a new sample lot by clicking the New button in the Recently Viewed Sample Lots section. For more information, see Creating Records (on page 51) and Sample Lot Fields (on page 675).

Working with Sample Lot Lists

The Sample Lot List section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for sample lots.

Sample Lot List	Filters
All Sample Lots	All sample lots to which you have visibility, regardless of who owns the sample lot. **NOTE:** Only sample lots that are being tracked by lot number in the inventory are displayed in the All Sample Lots list (see Sample Lot Fields (on page 675) for more information).
Recently Modified Sample Lots	All sample lots with your name in the Owner field, sorted by the modified date. **NOTE:** Only sample lots that are being tracked by lot number in the inventory are displayed in the Recently Modified Sample Lots list (see Sample Lot Fields (on page 675) for more information).

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Sample Lots

The Recently Modified Sample Lots section shows the sample lots most recently modified.

Click Show Full List to expand the list.

Adding Sections to Your Sample Lot Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Sample Lot Homepage:

- Recently Created Sample Lots

- Recently Modified Sample Lots

- My Recently Created Sample Lots

- My Recently Modified Sample Lots

- Additional report sections (Your company administrator can make report sections available for display on your Sample Lot Homepage.)

To add sections to your Sample Lot Homepage

1 On the Sample Lot Homepage, click Edit Layout.

2 On the Sample Lot Homepage Layout page, use the directional arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Related Topics

See the following topics for related information about sample lots:

- Sample Lots (on page 672)

- Sample Lot Fields (on page 675)

- Managing Sample Lots (on page 674)

Managing Sample Lots

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)

- Updating Record Details (on page 103)

- Linking Records to Your Selected Record (on page 104)

- Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about sample lots:

- Sample Lots (on page 672)

- Working with the Sample Lot Homepage (on page 672)

- Sample Lot Fields (on page 675)

Sample Lot Fields

Use the Sample Lot Edit page to add a sample lot or update details for an existing sample lot. The Sample Lot Edit page shows the complete set of fields for a sample lot.

TIP: You can also edit sample lots on the Sample Lot List page and the Sample Lot Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the sample lot fields.

Field	Description
Lot Number	The specified manufacturing lot number for the product.
Sample	The name of the sample product. **NOTE:** When creating a new sample lot record, only products that are categorised as samples (that is, products of the category type, Samples Dropped) can be entered in this field.
Start Date	The date that the sample lot became available.
Expiration Date	The date that the sample lot expires.
Short Days	The number of days for which the samples administrator has determined to stop sampling, prior to the expiration date. This numeric value is used in the calculation of the cut-off date.
CutOff Date (CutOff_Date)	The calculated date on which the sample lot is no longer valid to drop. This date is calculated by Oracle CRM On Demand by subtracting the number of short days from the expiration date. **NOTE:** You may see the field name CutOff_Date instead of CutOff Date according to what has been set up by your company administrator. CutOff_Date is used if you require date processing in your application, for example, in Oracle CRM On Demand Disconnected Mobile Sales. CutOff Date is the text version of CutOff_Date.
Status	This is a read-only field, which indicates whether the sample can be fulfilled. The possible values are as follows: ■ **Good.** Indicates that the current date is before the cut-off date ■ **Expired.** Indicates that the current date is after the expiration date ■ **Short Dated.** Indicates that the current date is between the expiration date and cut-off date
Inventory by Lot	A check box that indicates whether the sample lot is being tracked on a lot number basis in the inventory. The company administrator defines this field. ■ If selected, then this sample lot will be tracked by lot number in the inventory.

Field	Description
	■ If not selected, then this sample lot will not be tracked by lot number in the inventory.
Sample: Part #	The sample product number.
Description	A general description of the sample lot.

Related Topics

See the following topics for related information about sample lots:

■ Sample Lots (on page 672)

■ Working with the Sample Lot Homepage (on page 672)

■ Managing Sample Lots (on page 674)

Sample Disclaimers

Use the Sample Disclaimer pages to create, update, and track disclaimers for a company. When a sales representative captures a signature for a sample that has been dropped, the corporate disclaimer is presented to the physician to view.

A *sample disclaimer* is the text that is displayed to deny responsibility for certain adverse effects and reduce liability for a product sample that is dropped off to a physician or other health care professional. The wording of the text in each disclaimer is carefully written and approved by legal, marketing, or sample compliance officers from the pharmaceutical company, or both. In Oracle CRM On Demand, the text for only one sample disclaimer is active at any time for a company.

Oracle CRM On Demand supports two types of sample disclaimers:

■ **Global.** A *global sample disclaimer* contains one disclaimer record for each company instance. This disclaimer applies to all products provided as samples, and is displayed at the time of signature capture to confirm receipt of the product samples. Only one global sample disclaimer can be active at any time. This global sample disclaimer is the default type for Oracle CRM On Demand.

■ **Multilingual.** A *multilingual sample disclaimer* contains an unlimited number of sample disclaimers text records in multiple languages, which are grouped by the countries that apply to the disclaimer. Each disclaimer record consists of a header section, which includes the relationship code (which represents the derived name for the disclaimer), type, status, language, and country for the disclaimer, and a language-specific Related Disclaimer section that contains the translated disclaimer text required by the company. For more information on these fields and the Related Disclaimer section, see Sample Disclaimer Fields (on page 684). More than one set of multilingual sample disclaimers can be active at the same time. Before you can use multilingual sample disclaimers, your company administrator must set up special page layouts as described in the *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.

Customers typically start with only global disclaimers, and then they customise them to be multilingual as required. Although it is possible to have a hybrid of global and multilingual disclaimers, customers typically use only one type or the other.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking disclaimer information, the Sample Disclaimer tab might be excluded from your set-up.

Working with the Sample Disclaimer Homepage

The Sample Disclaimer Homepage is the starting point for managing sample disclaimers. This page displays information that is relevant to you.

NOTE: Your company administrator can customise the layout of your Sample Disclaimer Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Before you begin. To work with sample disclaimers, your user role must include the Enable Basic Samples Operations privilege.

Creating a Sample Disclaimer

You can create a sample disclaimer by clicking New in the Recently Modified Sample Disclaimers section. All sample disclaimers have a status of Inactive when created. For more information, see Creating Records (on page 51) and Sample Disclaimer Fields (on page 684).

NOTE: When you copy a sample disclaimer, it does not copy any child related disclaimer records, however, when you delete a sample disclaimer, the entire disclaimer along with any child related disclaimer records are deleted.

Working with Sample Disclaimer Lists

The Sample Disclaimer List section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for sample disclaimers.

Sample Disclaimer List	Filters
All Sample Disclaimers	All sample disclaimers to which you have visibility, regardless of the disclaimer type or who owns the sample disclaimer.
Recently Modified Sample Disclaimers	All sample disclaimers that have been modified recently, sorted by the modified date. Click the sample disclaimer relationship code (that is, the derived name for the disclaimer) to open the parent Sample Disclaimer detail page.

NOTE: Your company administrator might set up additional customised lists, for example, to display multilingual disclaimers. For more information on setting up customised lists and page layouts, see *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Sample Disclaimers

The Recently Modified Sample Disclaimers section shows the sample disclaimers that were modified most recently.

Click Show Full List to expand the list.

Adding Sections to Your Sample Disclaimer Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Sample Disclaimer Homepage:

- Recently Created Sample Disclaimers

- Recently Modified Sample Disclaimers

- Additional report sections (Your company administrator can make report sections available for display on your Sample Disclaimer Homepage.)

To add sections to your Sample Disclaimer Homepage

1   On the Sample Disclaimer Homepage, click Edit Layout.

2   On the Sample Disclaimer Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page. Click Save.

Related Topics

See the following topics for related information about sample disclaimers:

- Sample Disclaimers (on page 676)

- Managing Sample Disclaimers (on page 678)

- Sample Disclaimer Fields (on page 684)

- Related Disclaimer Fields (on page 686)

Managing Sample Disclaimers

For step-by-step procedures for managing sample disclaimers, see the following:

- Creating Global Sample Disclaimers (on page 679)

■ Creating Multilingual Sample Disclaimers (on page 680)

■ Marking a Related Disclaimer as the Default (on page 680)

■ Activating a Sample Disclaimer (on page 681)

■ Converting Global Disclaimers to Multilingual Disclaimers (on page 683)

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

■ Sample Disclaimers (on page 676)

■ Working with the Sample Disclaimer Homepage (on page 677)

■ Sample Disclaimer Fields (on page 684)

■ Related Disclaimer Fields (on page 686)

Creating Global Sample Disclaimers

A global sample disclaimer contains the sample disclaimer text instance to use for your company and is available by default.

Before you begin. To create a global sample disclaimer, your user role must include the Enable Basic Samples Operations privilege.

To create a global sample disclaimer

1 On the Sample Disclaimer Homepage, click New in the Recently Modified Sample Disclaimers section.

2 Complete the fields in the Key Disclaimer Information section.

For more information on Sample Disclaimer fields, see Sample Disclaimer Fields (on page 684).

Note: If the Type field is available on the Disclaimer record, ensure it is set to Global.

3 Save the Sample Disclaimer record.

Oracle CRM On Demand creates the new sample disclaimer record with a status set to Inactive.

Creating Multilingual Sample Disclaimers

A multilingual sample disclaimer consists of a main header section, which includes information, such as the relationship code (the derived name for the disclaimer), language, and country for the sample disclaimer. It also includes multiple, related disclaimer records. Each record contains the disclaimer text in one of the languages that are applicable to the disclaimer.

Before you begin. To create a multilingual sample disclaimer, your user role must include the Enable Basic Samples Operations privilege, and your company administrator must set up the page layouts for multilingual sample disclaimers.

To create a multilingual sample disclaimer

1 On the Sample Disclaimer Homepage, click New in the Recently Modified Multilingual Sample Disclaimers list.

2 Complete the fields in the Key Disclaimer Information section.

   Note: If the Type field is available on the Disclaimer record, then set the field to Multilingual.

   For information on Sample Disclaimer fields, see Sample Disclaimer Fields (on page 684).

3 Save the sample disclaimer record.

   Oracle CRM On Demand creates the new sample disclaimer record with a status set to Inactive.

4 Complete the Related Disclaimer section containing the translated disclaimer text for the sample disclaimer:

   a In the Related Disclaimer section of the Sample Disclaimer Detail page, click New.

   b Complete the fields in the Related Disclaimer section.

   For information on Related Disclaimer fields, see Sample Disclaimer Fields (on page 684).

   c Save the related disclaimer record.

   d Create additional, related disclaimer records for the sample disclaimer as required.

Marking a Related Disclaimer as the Default

For multilingual sample disclaimers, you must select one related disclaimer record as the default. Only one related disclaimer can be marked as the default.

Before you begin. To create a multilingual sample disclaimer, your user role must include the Enable Basic Samples Operations privilege.

To mark a related disclaimer as the default

■ In a Sample Disclaimer Detail page, use the Lookup selector for the Language field to select the default language.

   The available languages are derived from the languages that are specified in the Related Disclaimer child records

Activating a Sample Disclaimer

All sample disclaimer records are automatically assigned a status of Inactive when they are created. When all the text in a sample disclaimer record is defined and approved by the appropriate departments within your company, then you can activate the sample disclaimer record.

Restrictions That Apply to Sample Disclaimers

The following restrictions apply to sample disclaimers:

■ Any new disclaimer that you create either by clicking New or Copy remains inactive until it is activated when you click the Activate button.

■ After a sample disclaimer has been activated, it becomes read-only. You can only copy the active disclaimer by using the Copy link for the disclaimer listed on the Sample Disclaimer List page. If a business process for sample disclaimers is configured, then you receive an error message if you click the Edit and Delete links. If a disclaimer is inactive, then the Edit and Delete links on the Sample Disclaimer List page are active. Activating a new disclaimer renders the duplicate active disclaimer as expired because the duplicate becomes outdated.

■ You cannot update the status of a disclaimer manually. If you try to manually update the status, then you receive an error message.

■ Sales representatives, physicians, and other health care professionals can view the sample disclaimer that is currently active during the signature-capture process.

Restrictions That Apply to Global Sample Disclaimers

The following restrictions apply:

■ Only one sample disclaimer can be active at the same time.

■ The Disclaimer Text field for the disclaimer must contain content. If the field is empty, then you receive an error message when you try to activate the disclaimer.

Restrictions That Apply to Multilingual Sample Disclaimers

The following restrictions apply:

- The sample disclaimer must contain at least one child related disclaimer record and a valid, default related disclaimer record before you activate the disclaimer.

- More than one set of multilingual disclaimers can be active at the same time. The number of multilingual disclaimers that can be active is not limited. However, only a single multilingual disclaimer can be active for each country.

- If you try to activate a new sample disclaimer that defaults to global, then Oracle CRM On Demand issues a warning that you are attempting to replace one or more multilingual sample disclaimers with a single global sample disclaimer. If you continue to activate this sample disclaimer, then Oracle CRM On Demand expires all active disclaimers.

- For inactive disclaimers, if the default related disclaimer record is deleted, then you are required to choose a new default related disclaimer. If you do not, then you receive an error message requiring you to select a default language before you activate the disclaimer.

- If your company administrator configures a business process for sample disclaimers, then the following restrictions apply:

  - For an active or expired sample disclaimer, the related information section becomes read-only. Attempting to edit, delete, or create a related disclaimer generates an error in Oracle CRM On Demand.

  - You cannot make changes to or delete an expired or currently active sample disclaimer or its related disclaimers. However, you can edit these records if a business process for sample disclaimers has not been set up.

    For more information on setting up a business process for sample disclaimers, see *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.

Before you begin. To activate sample disclaimers, your user role must include the Enable Basic Samples Operations privilege.

To activate a sample disclaimer record

1 On the Sample Disclaimer List page, click the relationship code for sample disclaimer record that you want to activate. You must select a sample disclaimer record that has a status of Inactive.

2 On the Sample Disclaimer Detail page, click Activate to activate the sample disclaimer record.

   Activating the sample disclaimer does the following:

   - Sets the start date for the newly activated sample disclaimer and the end date for the previously active sample disclaimer (if there was one)

   - Sets the status of the previously active sample disclaimer to Expired, and changes the relationship code accordingly

   - For multilingual sample disclaimers, activates all related disclaimer records that are listed in the Related Disclaimers sections

Converting Global Disclaimers to Multilingual Disclaimers

If your company is using global sample disclaimers and decides to use multilingual sample disclaimers, then complete the following procedure.

TIP: Before you begin the conversion, ensure that the global disclaimer text has been translated into the languages that are required for your company by using an external translation service, and that the translated disclaimer text is available for you to enter as related disclaimer text.

NOTE: This procedure applies to inactive global disclaimers only. For global disclaimers with any other status, business process configuration prevents you from editing disclaimer records.

Before you begin. To create a multilingual sample disclaimer, your user role must include the Enable Basic Samples Operations privilege, your company administrator must set up the page layouts for multilingual sample disclaimers, and the disclaimers must be inactive. All disclaimer text must be translated into the required languages for the sample disclaimer, typically by an external translation service.

To convert a global disclaimer to a multilingual disclaimers

1   From the Recently Modified Global Sample Disclaimers list, click an active global disclaimer that you want to convert, and note the disclaimer text for reference.

2   Copy the global sample disclaimer.

    The new disclaimer that is copied is inactive by default.

3   To convert the copied global disclaimer record to a multilingual disclaimer record, select Multilingual for the Type field, and then select the country from the Country selector.

    NOTE: Your company administrator must make this field accessible because it is not available by default.

4   Save the Sample Disclaimer record.

    Oracle CRM On Demand creates the new sample disclaimer record with a status set to Inactive.

5   Complete the Related Disclaimer section containing the translated disclaimer text for the Sample Disclaimer:

    a   In the Related Disclaimer section of the Sample Disclaimer Detail page, click New.

    b   Complete the fields in the Related Disclaimer section.

        For more information on Related Disclaimer fields, see Sample Disclaimer fields.

    c   Save the Related Disclaimer record.

    d   Create additional Related Disclaimer records for the Sample Disclaimer as required.

6   In the parent Sample Disclaimer record, select the default language from the Language selector, and save the record.

7   Convert additional, global disclaimers to multilingual disclaimers as required.

Sample Disclaimer Fields

Use the Sample Disclaimer Edit page to create a sample disclaimer, or update details for an existing sample disclaimer. The Sample Disclaimer Edit page shows the complete set of fields for a sample disclaimer.

TIP: You can also edit sample disclaimers on the Sample Disclaimer List page and the Sample Disclaimer Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the sample disclaimer fields.

Field	Description
Key Disclaimer Information	
Disclaimer Text	(Global disclaimer type only.) The disclaimer text that you want to insert for a global disclaimer. This field has a maximum of 1000 characters.
Relationship Code	A calculated value that identifies a sample disclaimer. This field is automatically populated as follows: ■ For global disclaimers, Oracle CRM On Demand sets the value by using a concatenation of the Status and Created fields (*<Status>_<Created>*), for example, Active_7/5/2012 01:36:09. ■ For multilingual disclaimers, Oracle CRM On Demand sets the value by using a concatenation of the Country, Status, Created, and Language fields (*<Country>_<Status>_<Created>_<Language>*), for example, USA_Active_7/5/2012 01:36:09_English_American.
Type	Indicates the disclaimer type. The type can be one of the following: ■ **Global.** The disclaimer contains one disclaimer text record that applies globally to the company. Global disclaimers are the default type. ■ **Multilingual.** The disclaimer contains multilingual disclaimer text records that can be used globally in the company. **NOTE:** This field is not available by default. For multilingual sample disclaimers, your company administrator changes the default value to Multilingual by using the field set-up but typically does not make this field accessible to users. For more information on setting up this field and the Sample Disclaimer page layouts, see *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.

Field	Description
Status	The status of the disclaimer text, which can be one of the following values:
	■ **Inactive.** All sample disclaimer records have a status of Inactive when they are created.
	■ **Active.** When a sample disclaimer record is activated, its status changes to Active. For global sample disclaimers, only one disclaimer can be active at any point in time. For multilingual disclaimers, only one disclaimer can be active per country at any point in time
	■ **Expired.** When a new sample disclaimer record is created and activated, the status of the previously active sample disclaimer record changes to Expired.
	NOTE: This field is updated only when you click the Activate button on a sample disclaimer. You cannot update this field manually in the user interface or through Web services.
Start Date	The date when the disclaimer becomes active.
	This field remains blank when a sample disclaimer record is created. After the sample disclaimer record is activated, Oracle CRM On Demand populates this field with the current date.
Country	(Multilingual disclaimer type only.) The country that is used to group a set of unique, legal disclaimer texts, which have been translated into one or more languages. The disclaimer text child records are contained in the Disclaimer Text section of a multilingual Sample Disclaimer Detail page.
	This field is required for activating multilingual disclaimers.
Language	(Multilingual disclaimer type only.) The default language for a multilingual sample disclaimer, for example, English-American. Use the Lookup selector to select the default language. The available languages depend on the languages in the Related Disclaimer records.
End Date	The date when the disclaimer expires.
	This field remains blank when a sample disclaimer record is created. When Oracle CRM On Demand changes the status of a disclaimer record to Expired, it populates this field with the date.
Description	
Comments	General comments associated with the disclaimer. You can add comments only to inactive sample disclaimers.
Record Information	
Created	The user that created the Sample Disclaimer record, along with the date and timestamp when created.
Modified	The user that modified the Sample Disclaimer record, along with the date and timestamp when modified.

NOTE: For information on the related disclaimer child records, see Related Disclaimer Fields (on page 686).

Related Information

See the following topics for related information about sample disclaimers:

- Sample Disclaimers (on page 676)
- Working with the Sample Disclaimer Homepage (on page 677)
- Managing Sample Disclaimers (on page 678)
- Related Disclaimer Fields (on page 686)

Related Disclaimer Fields

Use the Related Disclaimer Edit page to create a related disclaimer or to update details for an existing related disclaimer. The Related Disclaimer Edit page shows the complete set of fields for a related disclaimer. Related disclaimers are child records of a sample disclaimer.

NOTE: Related disclaimers apply only to multilingual disclaimers.

The Related Disclaimers section in a multilingual sample disclaimer contains the set of related disclaimers for a particular country. Any changes that you make to the related disclaimer updates the value for the Modified field on the parent sample disclaimer record. If a business process for a sample disclaimer is configured, then you can create a new, related disclaimer, or you can edit an existing one until the parent record is activated. At this point, the entire disclaimer, including its related disclaimers, becomes read-only.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the related disclaimer fields.

Field	Description
Key Disclaimer Information	
Disclaimer Text	The disclaimer text that you want to insert, in the appropriate language.
	NOTE: Oracle CRM On Demand customers must translate disclaimer texts into the languages that they require. Oracle CRM On Demand does not translate this text.
	This field has a maximum of 1000 characters. It is a required field.
Language	The language for the disclaimer text, for example, Spanish. Select the language by using the Language selector. This field must have a unique value for each related disclaimer; that is, different related disclaimers must contain different language settings. Adding a duplicate value in this field results in an error message.
	This field is required.
Default Language	The default language for a multilingual sample disclaimer, for example, English-American. Selecting the default language for a related disclaimer sets the default language for the sample disclaimer.
Record Information	

Field	Description
Created	The user who created the Related Disclaimer record, along with the date and timestamp when created.
Modified	The user who modified the Related Disclaimer record, along with the date and timestamp when modified.

Related Information

See the following topics for related information about sample disclaimers:

- Sample Disclaimers (on page 676)

- Working with the Sample Disclaimer Homepage (on page 677)

- Managing Sample Disclaimers (on page 678)

- Sample Disclaimer Fields (on page 684)

Sample Requests

Use the Sample Request pages to create, update, and manage requests for product samples during a sales call, for example, when a pharmaceutical sales representative drops product samples to a physician.

A *sample request* is a mechanism for sales representatives to place orders for product samples on behalf of physicians or other health care providers. A sample request includes one or more sample request items, with each sample request item representing a product sample that has been requested.

Oracle CRM On Demand process administration supports sample requests because a sample request is part of a call activity that requires a signature, and includes sample requests within call activity locking. Sample requests have their own rules to allow the locking of the sample request items. For more information on process administration, see Process Administration Functionality. For recommendations on how to set up the locking rules for sample request, see *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.

Sample Request Requirements

Sample requests must meet the following requirements, otherwise they cannot be submitted after they are created:

- A sample request must have a contact with a valid address.

- A sample request must have at least one sample request line item showing a positive number.

- Process administration for sample requests must be set up as described in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition* so that record locking occurs.

Sample Request Restrictions

Sample requests have the following restrictions:

- Only one sample request is allowed for a call; that is, an account, contact, or attendee call.

- After a sample request is set to Signed, the only field that you can edit is the Status field.

- If you want to lock a sample request record, then your administrator must configure a field-level process-administration rule that locks all the sample request item fields except the Status field. The Status field can change from Signed to Voided, or Signed to Approved to Back Ordered to Fulfilled. You can track these changes in status by asking your administrator to configure a process to fetch those changes in status to Oracle CRM On Demand Life Sciences Edition. For more information on setting up process locking, see *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.

About Linking Sample Request Information to Calls

Before Oracle CRM On Demand Release 22, it was possible to insert a sample request item record without an associated parent sample request record by using Web services or the Import function. However, for Release 22 and later, when inserting sample request item records by using Web services or the Import function, you must provide the sample request ID of the parent to provide the context for the sample request item. From the Oracle CRM On Demand user interface, you can create a sample request item only from a parent sample request in the context of a call. In addition, product-blocking rules are not followed when sample request items are inserted or updated using Web services or the Import function.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking Sample Request information, then the Sample Request tab might be excluded from your set-up.

Working with the Sample Request Homepage

The Sample Request Homepage is the starting point for managing sample request records.

NOTE: Your company administrator can customise the layout of your Sample Request Homepage. In addition, if your user role includes the Personalise Homepages privilege, then you can add sections to the page, and remove sections from the page.

Before you begin. To work with sample requests, your user role must include the Enable Basic Samples Operations privilege.

Creating a Sample Request

You can create a new sample request by clicking the New button in the Recently Modified Sample Requests section. For more information, see Creating Records (on page 51) and Sample Request Fields (on page 690).

Working with Sample Request Lists

The Sample Request Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes

with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for sample requests.

Sample Request List	Filters
All Sample Requests	All sample requests to which you have visibility, regardless of who owns the sample request.
Recently Modified Sample Requests	All sample requests that have been modified recently, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Sample Requests

The Recently Modified Sample Requests section shows the sample requests that you viewed most recently.

Click Show Full List to expand the list.

Adding Sections to Your Sample Request Homepage

If your user role includes the Personalise Homepages privilege, then you can add some or all of the following sections to your Sample Request Homepage:

- Recently Created Sample Requests

- Recently Modified Sample Requests

- My Recently Created Sample Requests

- My Recently Modified Sample Requests

- Additional report sections (Your company administrator can make report sections available for display on your Sample Request Homepage.)

To add sections to your Sample Request Homepage

1   On the Sample Request Homepage, click Edit Layout.

2   On the Sample Request Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page. Click Save.

Related Topics

See the following topics for related information about sample requests:

- Sample Requests (on page 687)
- Sample Request Fields (on page 690)
- Managing Sample Requests (on page 690)
- About the Automatic Population of Sample Request Fields (on page 692)
- Linking Sample Request Information to Calls (on page 645)

Managing Sample Requests

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 103)
- Linking Records to Your Selected Record (on page 104)
- Working with Lists (on page 112)
- Viewing Audit Trails for Records (on page 164)
- Sharing Records (Teams) (on page 134)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Sample Request Fields

Use the Sample Request Edit page to add a sample request or update the details for an existing sample request. The Sample Request Edit page shows the complete set of fields for a sample request.

TIP: You can also edit sample requests on the Sample Request List page and the Sample Request Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the sample request fields.

Field	Description

Field	Description
Key Sample Request Information	
Order Number	A unique number that is assigned to each sample request order. Oracle CRM On Demand generates this number.
Type	The Sample Request category. The default value for Type for a sample request record is Sample Request. You can choose the following values by using the picklist: Sample Request and Order. **NOTE:** Your company administrator must set up this editable field to be available on the page layout because it is not available on the page layout by default.
Account	The account that is associated with the sample request order. This field is automatically populated. For more information, see About the Automatic Population of Sample Request Fields (on page 692).
Contact	(Required) The contact that is associated with the sample request order. This field is automatically populated if the sample request is created from a call. For more information, see About the Automatic Population of Sample Request Fields (on page 692). This field must be completed to create a sample request order. For more information, see Linking Sample Request Information to Calls (on page 645).
Order Created	The date on which the sample request order was created.
Shipping Address	(Required) The address to which the sample request order will be shipped. You must select a contact or account before you can select an address. The address can be a non-shared address or a shared address that has been validated. This field is automatically populated if the sample request is created from a call. For more information, see About the Automatic Population of Sample Request Fields (on page 692). This field must be completed to create a sample request order. For more information, see Linking Sample Request Information to Calls (on page 645).
Status	The default value for this field is Pending. When you submit a sample request order for products, the value in this field changes to Submitted. The possible values for this field are: ■ Back Ordered ■ Booked ■ Created ■ Entered ■ Failed ■ In Progress ■ Pending ■ Processed ■ Received ■ Rejected

Field	Description
	■ Shipped ■ Signed ■ Submitted ■ Voided
Additional Information	
Owner	The person who created this sample request order record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Created	The date and time when the sample request record was created.
Modified	The date and time when the sample request record was last modified.
Available Section	
Description	(Optional) A description of the order.

Related Information

See the following topics for related information about sample requests:

■ Sample Requests (on page 687)

■ Working with the Sample Request Homepage (on page 688)

■ Managing Sample Requests (on page 690)

■ About the Automatic Population of Sample Request Fields (on page 692)

■ Linking Sample Request Information to Calls (on page 645)

About the Automatic Population of Sample Request Fields

Oracle CRM On Demand populates the Account, Contact, and Shipping Address fields automatically when you create the sample request from an account call or a contact call.

NOTE: In the following cases, you can use the Lookup icon to override the value that Oracle CRM On Demand selects.

If you create a sample request from an account call, then Oracle CRM On Demand populates the following fields as follows:

■ **Account.** Oracle CRM On Demand populates this field with the account name from the parent account call.

- **Contact.** Oracle CRM On Demand populates this field with the contact name from the parent account call.

  If the contact is missing from the parent account call, then Oracle CRM On Demand populates the field with the account's primary contact. If a primary contact does not exist for the account, then Oracle CRM On Demand displays an error message if you try to save the record.

- **Shipping Address.** Oracle CRM On Demand populates this field with the contact's primary address from the parent account call.

  If the contact's primary address is missing from the parent account call, then Oracle CRM On Demand populates this field with the account's shipping address. If the account's shipping address is missing, then Oracle CRM On Demand leaves this field empty. However, if you try to save the record, then Oracle CRM On Demand displays an error message.

If you create a sample request from a contact call or attendee call, then Oracle CRM On Demand populates the following fields as follows:

- **Account.** Oracle CRM On Demand populates this field with the account name from the parent contact call or attendee call.

  If the account is missing from the parent contact call or attendee call, then Oracle CRM On Demand populates the field with the contact's primary account. If the contact has no primary account, then Oracle CRM On Demand leaves the account field empty.

- **Contact.** Oracle CRM On Demand populates this field with the contact name from the parent contact call or attendee call.

- **Shipping Address.** Oracle CRM On Demand populates this field with the contact's primary address from the parent contact call or attendee call.

  If the contact's primary address is missing from the parent contact call or attendee call, then Oracle CRM On Demand populates this field with the account's shipping address. If the account's shipping address is missing, then Oracle CRM On Demand leaves this field empty.   However, if you try to save the record, then Oracle CRM On Demand displays an error message.

Personalised Content Delivery

This topic introduces the Personalised Content Delivery (PCD) features available with Oracle CRM On Demand Life Sciences Edition.

About Personalised Content Delivery

Personalised Content Delivery (PCD) is Oracle's closed-loop marketing solution for electronic detailing presentations. PCD enables sales and marketing organisations to manage digital content, create messaging plans, and distribute these messaging plans to the field sales force. Sales organisations can then deliver tailored presentations to customers while automatically capturing customer response metrics to be passed back to the marketing organisation for closed loop analysis. PCD is required for delivering presentations and capturing customer-response metrics.

Scenario for Using PCD

Oracle CRM On Demand PCD enables users to:

- Manage digital content

- Manage Messaging Plans

- Store Customer Responses to Messaging Plans

The intended users of the Oracle CRM On Demand PCD solution are product managers, sales operations managers, and others who develop collateral for use by a sales force.

The following scenario provides an overview of how the PCD functionality is intended to be used:

1 Manage Digital Content

Digital content (graphics files) are first attached to a solution record. While PCD supports a wide range of graphic formats, the most common format is a SWF file, which enables rich media presentations. A corresponding thumbnail image (typically a PNG, GIF, or JPG file) would also be attached to the same solution record to provide for a compact graphical representation of the larger media file. The solution record includes fields for metadata about the attached file, such as expiration date, and whether it has received marketing and legal approval.

To set up solution records, see Solutions (on page 423).

2 Manage Messaging Plans

After attaching graphics files to Solution records, users create messaging plans, consisting of a collection of media files arranged to communicate a sales message. Users specify a sequence of messaging plan items that make up a messaging plan. Each messaging plan item corresponds to a Solution record and its associated digital content, and also includes related media files that a presenter can use to go into more detail on a given topic. Whereas a Solution record consists of a digital media file that can be used for multiple messaging plans, a messaging plan item represents a unique instance of a given Solution media file, with metadata specific to the use of a media file for a particular messaging plan.

To set up a messaging plan and its associated records, see Messaging Plans (on page 694), Messaging Plan Items (on page 702), and Messaging Plan Item Relations (on page 708).

3 Store Customer Response to Messaging Plans

Messaging Plans are delivered in an application external to Oracle CRM On Demand. Oracle CRM On Demand receives audience feedback from the external application and stores this information. Such feedback is stored for discrete periods in the delivery of the messaging plan and can also be associated with predefined responses.

To set up message responses, see Adjusting Message Responses (on page 208).

Messaging Plans

Use the Messaging Plan pages to create, update, and track messaging plans.

A *messaging plan* is a presentation delivered using a personal computer or tablet computer. Sales users use a messaging plan to describe products and track customer feedback. The messaging plan pages capture various attributes of a messaging plan, such as the product it covers, the expiration date of the messaging plan, and other parameters.

Brand managers, product managers, and sales operation managers create messaging plans. Messaging plans consist of a specific sequence of content, so that sales users deliver presentations that comply with company legal and marketing guidelines.

A messaging plan might contain a number of messaging plan items in a specific sequence, analogous to a traditional presentation consisting of a number of slides. Or, a messaging plan might be one slide communicating a specific message. When creating an activity, sales representatives can review the recommended messaging plans for the activity, for example, a sales call, task, or appointment, to see if there are any recommendations. Messaging plan recommendations are based on the segment matches and objective associations between the messaging plan and the sales call, task, or appointment. For more information, see Reviewing Recommended Messaging Plans for Activities (on page 698).

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include the administration of messaging plan information, the messaging plan tab might be excluded from your setup. Your user role must include the Manage Personalised Content Delivery privilege to work with the messaging plan pages.

Working with the Messaging Plan Homepage

The Messaging Plan Homepage is the starting point for managing messaging plan records. This page contains several sections and displays information that is relevant to you.

NOTE: Your company administrator can customise the layout of your Messaging Plan Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Messaging Plan

You can create a new messaging plan by clicking the New button in the Recently Modified Messaging Plans section. For more information, see Creating Records (on page 51) and Messaging Plan Fields (on page 699).

Working with Messaging Plan Lists

The Messaging Plan Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for messaging plans.

Messaging Plan List	Filters
All Messaging Plans	All messaging plans to which you have visibility, regardless of who owns the messaging plan.

Messaging Plan List	Filters
Recently Modified Messaging Plans	All messaging plans with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Messaging Plans

The Recently Modified Messaging Plans section shows the messaging plans that you modified most recently.

Click the Show Full List link to expand the list.

Adding Sections to Your Messaging Plan Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Messaging Plan Homepage:

- Recently Created Messaging plans

- Recently Modified Messaging plans

- My Recently Created Messaging plans

- My Recently Modified Messaging plans

- Additional report sections (Your company administrator can make report sections available for display on your messaging plan Homepage.)

To add sections to your Messaging Plan Homepage

1 On the Messaging plan Homepage, click Edit Layout.

2 On the Messaging plan Homepage Layout page, click the directional arrows to add or remove sections, and to organise the sections on the page. Then click Save.

Managing Messaging Plans

For step-by-step procedures for managing messaging plans, see:

- Adding Books to a Messaging Plan (on page 697)

- Adding Messaging Plan Items (on page 698)

- Reviewing Recommended Messaging Plans for Activities (on page 698)

■ Creating Message Responses from a Messaging Plan (on page 699)

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

NOTE: The messaging plans feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about messaging plans:

■ Messaging Plans (on page 694)

■ Working with the Messaging Plan Homepage (on page 695)

■ Messaging Plan Fields (on page 699)

NOTE: Your user role must include the Manage Personalised Content Delivery privilege to work with the Messaging Plan pages.

Adding Books to a Messaging Plan

Use the following procedure to add books to a messaging plan. When you add a book to a messaging plan, you can then modify or remove the book. This procedure assumes that the book is exposed as a related item on the Messaging Plan Detail page. For more information about exposing related items, see Customising Related Item Layouts.

To add a book to a messaging plan

1 On the Messaging Plan List page, open the messaging plan that you want.

2 On the Messaging Plan Detail page, click Add in the Books section of the page.

3 In the book selector, choose the book that you want to add to the messaging plan, and then click OK.

   For more information about books, see Book Management.

Adding Messaging Plan Items

You can add a messaging plan item to a messaging plan. A messaging plan item contains information about the items that make up a messaging plan. For more information on messaging plan items, see Messaging Plan Items (on page 702).

NOTE: If you do not see the Messaging Plan Item Relations related item section in your Contact Detail page, add this related item section, as described in Customising Related Item Layouts, or contact your company administrator.

To add a messaging plan item to a messaging plan

1   From the Messaging Plan Detail page, scroll to the Messaging Plan Item section and click New.

2   Complete the fields as described in Messaging Plan Item Fields (on page 706). Then save the record.

Reviewing Recommended Messaging Plans for Activities

During activity creation, sales representatives can record information about the account, contact, or product associated with the activity. Sales representatives can also review the recommended messaging plans for the activity (sales call, task, or appointment) if there are any recommendations. Messaging plan recommendations are based on segment matches and objective associations between the messaging plan and the sales call, task, or appointment as follows:

■   If the primary or secondary segment of a messaging plan matches the segment specified for the contact, then the Recommendation field for the messaging plan in the Available Message Plans section on the Call Detail page is populated with a full gold star.

■   If the primary or secondary objective of a messaging plan matches the objective specified for the activity, then the Recommendation field for the messaging plan in the Available Message Plans section on the Call Detail page is populated with a half gold star.

■   If there are no segment or objective matches between the messaging plan and the contact or activity, then the Recommendation field for the messaging plan in the Available Message Plans section on the Call Detail page is populated with an empty white star.

For more information about sales calls, see Tracking Visits (Sales Calls) to Customers (on page 198) and Dropping Samples During a Sales Call (on page 630). For more information about activities, see Calendar and Activities (on page 177).

Use the following procedure to review the recommended messaging plans for activities.

To review recommended messaging plans for activities

1   Select the activity for your visit.

For instruction on selecting activities, see Finding Records. (see "Finding Records" on page 68)

2   On the Detail page (Call, Task, or Appointment Detail) for the activity, scroll down to the Calls section, and open the sales call that you want to review.

3 On the Call Detail page, scroll down to the Available Message Plans section, and review the list of messaging plans as follows:

- A full gold star in the Recommendation field indicates a segment match between the messaging plan and the contact.

- A half gold star in the Recommendation field indicates a match of objectives between the messaging plan and the activity.

- An empty white star in the Recommendation field indicates that there is no match (segment or objectives) between the messaging plan and the activity.

4 Click the message plan name link to open and review the messaging plan.

Creating Message Responses from a Messaging Plan

You can add a message response to a messaging plan. A *message response* is feedback received from the audience during the presentation of a messaging plan during a particular period. For more information on message responses, see Adjusting Message Responses (on page 208).

NOTE: Create a message response from a messaging plan or a messaging plan item only if you have repurposed the page layouts for these records   using structured product messaging page layouts (that is, the message response has been repurposed as an outcome, the messaging plan is repurposed as a call plan, and so on). With structured product messaging, pharmaceutical sales representatives can choose from a set of standard responses such as *Requested more information*, *Positive reaction*, and so on. For more information on how these record types are repurposed, see Structured Product Messaging.

Before you begin. Your user role must include the Manage Personalised Content Delivery privilege to work with the Message Response pages and your company administrator must add in the Message Responses related information section to the Messaging Plan Detail page.

To create a Message Response from a Messaging Plan

1 If you do not see the Message Responses related information section in your Messaging Plan Detail page, add this related information section, as described in Customising Related Item Layouts, or contact your company administrator.

2 From the Messaging Plan Detail page, scroll to the Message Responses related information section and click New.

3 Complete the fields as described in Adjusting Message Responses (on page 208).

4 Save the Message Response record.

Messaging Plan Fields

Use the Messaging Plan Edit page to add a messaging plan, or update details for an existing messaging plan. The Messaging Plan Edit page shows the complete set of fields for a messaging plan.

TIP: You can also edit messaging plans on the Messaging Plan List page and the Messaging Plan Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the messaging plan fields.

Field	Description
Key Messaging Plan Information	
Name	The name of the messaging plan. (Required.)
Type	The messaging plan category. Use the picklist to choose the type. (Required.)
	The default values for Type are Product Launch, Targeted Message, Signature, and Call Objective Plan. Selecting a type can result in a different page layout from the default page layout for messaging plans if your administrator has set up dynamic page layouts for this record type. For example, selecting Call Objective Plan can result in a Call Objective page layout if your company administrator has set up dynamic page layouts. For more information on setting up dynamic page layouts for this record type, see Specifying Dynamic Page Layouts, and also see the topics about page layouts in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.
Product	The product associated with this messaging plan. Use the Lookup icon to select a product. (Required.)
	NOTE: The Product field value on the child Messaging Plan Item, Messaging Plan Item Relations, and Message Response records must be the same as the Product value for the parent Messaging Plan. However, Oracle CRM On Demand does not enforce this requirement. You must manually ensure this value is the same on all the child PCD records as this parent Messaging Plan, or else you encounter data integrity issues. For example, if you have Product set to AAAA in the Messaging Plan and you update the Product field for a Messaging Plan Item using Web services from AAAA to BBBB, then the Messaging Plan Item would inaccurately describe product BBBB instead of product AAAA.
Code	A free-text field that can be used to classify a messaging plan by intent, therapeutic area, or other organisationally defined classification.
Status	The current status of the messaging plan. Possible status values are: Approved, In Progress, Rejected, Released, or Submitted. Use the picklist to select a status. (Required.)
Verify	Indicates that each constituent messaging plan item of the messaging plan has been verified to display properly and consequently has a verification status of Successful. If all the constituent messaging plan items have a verification status value of Successful, the Verify field is set to a value of Successful. Otherwise, the value is set to Failed. This field is set automatically by Oracle CRM On Demand.
Segment	The market segment (that is, the group of accounts) at which the messaging plan is targeted.

NOTE: The Primary Target Objective, Primary Segment, Secondary Target Objective, and Secondary Segment fields are not available by default. To add these fields to the Messaging Plan Detail page, contact your company administrator.

Field	Description
Primary Target Objective	Indicates the first objective of this messaging plan. Enter your objective, or click the Lookup icon, and select an objective from the list.
Primary Segment	Indicates the primary segment to associate with this messaging plan. The options are: White Collar, Blue Collar, Rural/Farming, Mass Retail, Mass Affluent, High Net Worth, Penta-millionaires, and Ultra-High Net Worth.
Secondary Target Objective	Indicates the second objective of this messaging plan. Enter your objective, or click the Lookup icon, and select an objective from the list. **NOTE:** An error message is displayed when the primary objective and secondary objective are the same, and if a secondary objective is selected without a primary objective.
Secondary Segment	Indicates the secondary segment to associate with this messaging plan. The options are: White Collar, Blue Collar, Rural/Farming, Mass Retail, Mass Affluent, High Net Worth, Penta-millionaires, and Ultra-High Net Worth. **NOTE:** An error message is displayed when the primary segment and secondary segment are the same, and if a secondary segment is selected without a primary segment.
Owner	(Required.) The user who owns the messaging plan record. By default, this field is set to the user who created the messaging plan. Use the Lookup icon to change the owner.
Start Date	The date when the messaging plan becomes visible (MM/DD/YYYY). Use the Calendar icon to select the date.
Expiration Date	The date when the messaging plan is deactivated (MM/DD/YYYY). Use the Calendar icon to select the date.
Release Date	The date when this content can be used in Personal Content Delivery (PCD), (MM/DD/YYYY). Use the Calendar icon to select the date.
Disclosure Mandatory	This check box indicates that a disclosure message must be presented at the beginning of this messaging plan. (Required.)
Enable Follow-up	This check box is intended for future use.
Lock Sequence	This check box is not used in the current release of Oracle CRM On Demand. (Required.)
Product Indication	A combination of a symptom or malady and the specific product or drug that alleviates the symptom or malady. Typically, a pharmaceutical sales representative details the product indication during a call with a health practitioner. For more information, see Product Indications (on page 720). **NOTE:** This field is not set up by default. If you require this field, then contact your company administrator to set it up.
Additional Messaging Plan Information	
Audience	The description of the targeted audience for this messaging plan.
Comment	Any general comments on this messaging plan.
Description	The description of this messaging plan record.

NOTE: The following fields are used only with the Oracle CRM On Demand Disconnected Mobile Sales

Field	Description
application, and do not appear by default. They must be set up by your company administrator.	
Disable Navigation	Select this check box to disable the forward and backward buttons in the electronic detailer application for Oracle CRM On Demand Disconnected Mobile Sales, where customers implement their own navigation. The check box is deselected by default.
Disable Response	Select this check box to indicate that message responses are disabled for this message plan. The check box is deselected by default.
Default Menu Bar Control	Select this check box to indicate the use of the default tap menu bar in the electronic detailer application for Oracle CRM On Demand Disconnected Mobile Sales. The check box is deselected by default.

Related Information

See the following topics for related messaging plan information:

- Messaging Plans (on page 694)
- Working with the Messaging Plan Homepage (on page 695)
- Managing Messaging Plans (on page 696)

Messaging Plan Items

Use the Messaging Plan Item pages to create, update, and track messaging plan items.

A *messaging plan item* contains information about the items that make up a messaging plan. These items that make up a messaging plan are in a specific sequence, analogous to a traditional presentation consisting of a number of slides.

A *solution* is the multimedia content and graphic files (such as SWF, GIF or JPEG files) used in presentations that underlie a messaging plan item. While a solution can be reused, a messaging plan item is unique to a single messaging plan. The Messaging Plan Item page contains additional attribute information beyond what is associated with a solution.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking messaging plan item information, the Messaging Plan Item tab might be excluded from your setup. Your user role must include the Manage Personalised Content Delivery privilege to work with the Messaging Plan Item pages.

Working with the Messaging Plan Item Homepage

The Messaging Plan Item Homepage is the starting point for managing messaging plan item records. This page displays information that is relevant to you.

NOTE: Your company administrator can customise the layout of your Messaging Plan Item Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Messaging Plan Item

You can create a new messaging plan item by clicking the New button in the Recently Modified Messaging Plan Items section. For more information, see Creating Records (on page 51) and Messaging Plan Item Fields (on page 706).

Working with Messaging Plan Item Lists

The Messaging Plan Item Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for messaging plan items.

Messaging Plan Item List	Filters
All Messaging Plan Items	All messaging plan items to which you have visibility, regardless of who owns the messaging plan items.
Recently Modified Messaging Plan Items	All messaging plan items with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Messaging Plan Items

The Recently Modified Messaging Plan Items section shows the messaging plan items you modified most recently.

Click Show Full List to expand the list.

Adding Sections to your Messaging Plan Item Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Messaging Plan Item Homepage:

- Recently Created Messaging Plan Items

- Recently Modified Messaging Plan Items

- My Recently Created Messaging Plan Items

- My Recently Modified Messaging Plan Items

■ Additional report sections (your company administrator can make report sections available for display on your Messaging Plan Item Homepage)

To add sections to your Messaging Plan Item Homepage

1 On the Messaging Plan Item Homepage, click Edit Layout.

2 On the Messaging Plan Item Homepage Layout page, click the directional arrows to add or remove sections, and to organise the sections on the page. Click Save.

Managing Messaging Plan Items

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

■ Adding Messaging Plan Item Relations (on page 705)

■ Creating Message Responses from a Messaging Plan Item (on page 705)

NOTE: The messaging plan item feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about messaging plan items:

■ Messaging Plan Items (on page 702)

■ Working with the Messaging Plan Item Homepage (on page 702)

■ Messaging Plan Item Fields (on page 706)

NOTE: Your user role must include the Manage Personalised Content Delivery privilege to work with the Messaging Plan Item pages.

Adding Messaging Plan Item Relations

You can add a messaging plan item relation to a messaging plan item. A *messaging plan item relation* is a presentation item that provides optional   information to support the primary messaging plan item. For example, if the main item shows the side effects for a new drug, optional related information might show the side effects of an older class of drugs. If the theme from the main item is that a clinical trial had good results, optional details might show numbers from the clinical trial. For more information on messaging plan item relations, see Messaging Plan Item Relations (on page 708).

NOTE: If you do not see the Messaging Plan Item Relations related item section in your Contact Detail page, add this related item section, as described in Customising Related Item Layouts, or contact your company administrator.

To add a messaging plan item relation to a messaging plan item

1   From the Messaging Plan Item Detail page, scroll to the Messaging Plan Item Relation section, and click New.

2   Complete the fields, as described in Messaging Plan Item Relations Fields (on page 711). Save the record.

Creating Message Responses from a Messaging Plan Item

You can add a message response to a messaging plan item. A *message response* is feedback received from the audience during the presentation of a messaging plan during a particular period. For more information on message responses, see Adjusting Message Responses (on page 208).

NOTE: Create a message response from a messaging plan or a messaging plan item only if you have repurposed the page layouts for these records   using structured product messaging page layouts (that is, the message response has been repurposed as an outcome, the messaging plan is repurposed as a call plan, and so on). With structured product messaging, pharmaceutical sales representatives can choose from a set of standard responses such as *Requested more information*, *Positive reaction*, and so on. For more information on how these record types are repurposed, see Structured Product Messaging.

Before you begin. Your user role must include the Manage Personalised Content Delivery privilege to work with the Message Response pages and your company administrator must add in the Message Responses related information section to the Messaging Plan Item Detail page.

To create a Message Response from a Messaging Plan Item

1   If you do not see the Message Responses related information section in your Messaging Plan Item Detail page, add this related information section, as described in Customising Related Item Layouts, or contact your company administrator.

2   From the Messaging Plan Item Detail page, scroll to the Message Responses related information section and click New.

3   Complete the fields as described in Adjusting Message Responses (on page 208).

4   Save the Message Response record.

Messaging Plan Item Fields

Use the Messaging Plan Item Edit page to add a messaging plan item, or update details for an existing messaging plan item. The Messaging Plan Item Edit page shows the complete set of fields for a messaging plan item.

TIP: You can also edit messaging plan items on the Messaging Plan Item List page and the Messaging Plan Item Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information about some of the Messaging Plan Item fields.

Field	Description
Key Messaging Plan Item Information	
Sequence Number	The order in which this messaging plan item occurs within the messaging plan. (Required.)
Name	The name of the messaging plan item.
Display Name	The name with which the messaging plan item is displayed in a messaging plan.
Product	The product associated with the parent messaging plan. Use the Lookup icon to select a product. (Required.) **NOTE:** The Product field value must be the same as the parent Messaging Plan record. However, Oracle CRM On Demand does not enforce this requirement. You must ensure this value is the same as the parent Messaging Plan manually. If you do not, then you encounter data integrity issues. For example, if you have the Product field set to AAAA in the Messaging Plan, and if you update the Product field from AAAA to BBBB in any of the child PCD records (Messaging Plan Item, Messaging Plan Item Relations, or a Message Response) by using Web services, then the child PCD record describes product BBBB incorrectly, instead of product AAAA.
Solution Name	The name of the digital content that the messaging plan item relation is based on. Use the Lookup icon to select the solution. Before Release 23, the Solution field was a required field by default. However, for Release 23, this field is no longer required by default. However, if your company has customized the page layout for this record type that occurred before Release 23, then the Solution field remains a required field for those customized layouts. To change this field to Not Required, your company administrator must deselect the Required check box for the Solution field that was set up in the customized page layout for this record type. For more information on field setup, see Creating and Editing Fields.
Solution Name:	Indicates whether digital content can be properly displayed. The possible values

Field	Description
Verification Status	are: Not Verified, Successful, or Failed. (View-only) The value of this field is inherited from the linked Solution record that contains the digital content file.
Solution Name: Release Date	The date after which the solution content can be used in PCD. (View-only.)
Solution Name: Expiration Date	The date after which the solution content should not be used in PCD. (View-only.)
Disclosure Message	This check box flags a particular asset as a disclosure message. Often times, a messaging plan must be prefaced with a disclosure message or messages to ensure full disclosure of all relevant information and that all legal and regulatory guidelines are satisfied. (Required.)
Type	The messaging plan item category. Use the picklist to select a type. (Required.) The default values for Type are as follows: Message Plan Item, Attachment, Related, Detail, and Call Objective. Selecting a type can result in a different page layout from the default page layout for messaging plan items if your administrator has set up dynamic page layouts for this record type. For example, selecting Call Objective can result in a Call Objective page layout if it is set up by your administrator. For more information on setting up dynamic page layouts for this record type, see Specifying Dynamic Page Layouts and also see the topics about page layouts in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.
Rating	A qualitative rating of the effectiveness of this item. Use the picklist to select a rating.
Parent Messaging Plan	The messaging plan for which this messaging plan item is a component. Use the Lookup icon to select the parent messaging plan. (Required.)
Status	The current status of the messaging plan item. Use the picklist to select the status. The preconfigured choices are Hide and Show.
Description	A brief description of the content for this item.
Send Type	The type of PDF file of a sales presentation that is sent by the Oracle CRM On Demand Disconnected Mobile Sales application as an email to recipients. You can select the following send types: ■ **PDF Send.** A PDF of a full multislide presentation. ■ **Standard Send.** A PDF of only the first slide in the presentation, which is the default type. **NOTE:** This field is not available by default on the Messaging Plan Item page layout and must be added in by your administrator. For information about adding fields to page layouts, see Customising Static Page Layouts.

Field	Description
Disable Preload	Select this field to disable preload animations for the Oracle CRM On Demand Disconnected Mobile Sales application. By default, this field is not selected and the animations are preloaded. **NOTE:** This field is not available by default on the Messaging Plan Item page layout and must be added in by your administrator. For information about adding fields to page layouts, see Customising Static Page Layouts.
Message Plan Item Additional Information	
Synopsis	A brief description for the item.
Speaker Notes	Notes that you can add when presenting this item.
Audience	The targeted user for the content.

Related Topics

See the following topics for related information about messaging plan items:

- Messaging Plan Items (on page 702)
- Working with the Messaging Plan Item Homepage (on page 702)
- Managing Messaging Plan Items (on page 704)

Messaging Plan Item Relations

Use the Messaging Plan Item Relations pages to create, update, and track messaging plan item relations.

A *messaging plan item relation* is a presentation item that provides optional information to support the primary messaging plan item. For example, if the main item shows the side effects for a new drug, optional related information might show the side effects of an older class of drugs. If the theme from the main item is that a clinical trial had good results, optional details might show numbers from the clinical trial. A messaging plan is made up of a number of messaging plan items in a specific sequence, analogous to a traditional presentation consisting of a number of slides. Each messaging plan item might have related items associated with it, which are called *messaging plan item relations.* The Messaging Plan Item Relations page contains information about these supporting presentation items.

Messaging Plan Item Relations Must Be Unique

If you are setting up more than one Messaging Plan Item Relations record with the same Type value and parent Messaging Plan Item value, then the Solution field cannot be set to the same value. For example, if you attempt to create two messaging plan item relations records, MPIR1 and MPIR2, both with the Type set to Attachment, and if the parent messaging plan item record is set to MPIabc, then you must set the Solution field to different values for each messaging plan item relations record. Otherwise, Oracle CRM On Demand displays an error message.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking messaging plan item relations, the Messaging Plan Item Relations tab might be excluded from your set-up. Your user role must include the Manage Personalised Content Delivery privilege to work with the Messaging Plan Item Relations pages.

Working with the Messaging Plan Item Relations Homepage

The Messaging Plan Item Relations Homepage is the starting point for managing messaging plan item relations records. This page contains several sections and displays information that is relevant to you.

NOTE: Your company administrator can customise the layout of your Messaging Plan Item Relations Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Messaging Plan Item Relation

You can create a new messaging plan item relation by clicking the New button in the Recently Modified Messaging Plan Item Relations section. For more information, see Creating Records (on page 51) and Messaging Plan Item Relations Fields (on page 711).

Working with Messaging Plan Item Relations Lists

The Messaging Plan Item Relations Lists section shows a number of filtered lists. *Filtered lists* are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for Messaging Plan Item Relations.

Messaging Plan Item Relation List	Filters
All Messaging Plan Item Relations	All messaging plan item relations to which you have visibility, regardless of who owns the messaging plan item relation.
Recently Modified Messaging Plan Item Relations	All messaging plan item relations with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Messaging Plan Item Relations

The Recently Modified Messaging Plan Item Relations section shows the messaging plan item relations you modified most recently.

Click the Show Full List link to expand the list.

Adding Sections to your Messaging Plan Item Relations Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Messaging Plan Item Relations Homepage:

- Recently Created Messaging Plan Item Relations

- Recently Modified Messaging Plan Item Relations

- My Recently Created Messaging Plan Item Relations

- My Recently Modified Messaging Plan Item Relations

- Additional report sections (Your company administrator can make report sections available for display on your Messaging Plan Item Relations Homepage.)

To add sections to your Messaging Plan Item Relations Homepage

1   On the Messaging Plan Item Relations Homepage, click Edit Layout.

2   On the Messaging Plan Item Relations Homepage Layout page, click the directional arrows to add or remove sections, and to organise the sections on the page.

3   Click Save.

Managing Messaging Plan Item Relations

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)

- Updating Record Details (on page 103)

- Linking Records to Your Selected Record (on page 104)

- Working with Lists (on page 112)

NOTE: The messaging plan item relations feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about messaging plan item relations:

- Messaging Plan Item Relations (on page 708)
- Working with the Messaging Plan Item Relations Homepage (on page 709)
- Messaging Plan Item Relations Fields (on page 711)

NOTE: Your user role must include the Manage Personalised Content Delivery privilege to work with the Messaging Plan Item Relation pages.

Messaging Plan Item Relations Fields

Use the Messaging Plan Item Relations Edit page to add a messaging plan item relation, or update details for an existing messaging plan item relation. The Messaging Plan Item Relations Edit page shows the complete set of fields for a messaging plan item relation.

TIP: You can also edit messaging plan item relations on the Messaging Plan Item Relations List page and the Messaging Plan Item Relations Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the Messaging Plan Item Relations fields.

Field	Description
Key Messaging Plan Item Relations Information	
Name	The name of the messaging plan item relation.
Display Name	The name used to display the messaging plan item relation in the messaging plan.
Parent MP Item	The parent messaging plan item for which this messaging plan item relation provides the optional backup or detailed information. (Required.)
Product	The product associated with the parent messaging plan. Use the Lookup icon to select a product. (Required.) **NOTE:** The Product field value must be the same as the parent Messaging Plan record. However, Oracle CRM On Demand does not enforce this requirement. You must ensure this value is the same as the parent Messaging Plan manually. If you do not, then you encounter data integrity issues. For example, if you have the Product field set to AAAA in the Messaging Plan, and if you update the Product field from AAAA to BBBB in any of the child PCD records (Messaging Plan Item, Messaging Plan Item Relations, or a Message Response) by using Web services, then the child PCD record describes product BBBB incorrectly, instead of product AAAA.

Field	Description
Description	A brief description of the contents for this item.
Type	The messaging plan item relation category. Use the picklist to select a type. (Required.) The default values for Type are as follows: Message Plan Item, Attachment, Related, Detail, and Next Call Objective. Selecting a type can result in a different page layout from the default page layout for Messaging Plan Item Relations if your administrator has set up dynamic page layouts for this record type. For example, selecting Next Call Objective can result in a Next Call Objective page layout if it is set up by your administrator. For more information on setting up dynamic page layouts for this record type, see Specifying Dynamic Page Layouts and also see the topics about page layouts in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.
Solution Name	The name of the multimedia or graphic file content on which the messaging plan item relation is based. Before Release 23, the Solution field was a required field by default. However, for Release 23, this field is no longer required by default. However, if your company has customized the page layout for this record type that occurred before Release 23, then the Solution field remains a required field for those customized layouts. To change this field to Not Required, your company administrator must deselect the Required check box for the Solution field that was set up in the customized page layout for this record type. For more information on field setup, see Creating and Editing Fields.
Synopsis	A brief description for the item.

Related Information

See the following topics for related information about messaging plan item relations:

- Messaging Plan Item Relations (on page 708)

- Working with the Messaging Plan Item Relations Homepage (on page 709)

- Managing Messaging Plan Item Relations (on page 710)

Structured Product Messaging

Structured product messaging (SPM) refers to the repurposed personalised content delivery (PCD) record types (Messaging Plan, Messaging Plan Item, Messaging Plan Item Relations, and Message Response) that an administrator sets up to enable pharmaceutical sales representatives to manage their sales call objectives. An administrator repurposes the PCD record types by defining dynamic page layouts for these records. By appropriately selecting the Type picklist field for a PCD record, a user can dynamically change the page layout corresponding to the PCD record that is being used in Oracle CRM On Demand. For example, selecting Type

with a value of Call Objective changes the page layout for a Messaging Plan Item to a Call Objective page layout.

The SPM page layouts that correspond to the PCD record types are as follows: Call Objective Plan (for Messaging Plan), Call Objective (for Messaging Plan Item), Next Call Objective (for Messaging Plan Item Relations), and Outcome (for Message Response). Typically, a sales representative uses a call objective plan to record call objectives, next call objectives, and outcomes for sales calls associated with a product, for example, a drug.

If you are using the default PCD record types to manage electronic detailing presentations, then see Personalised Content Delivery (on page 693). In addition, to capture product detailing information during calls, using the default layouts, see Linking Product Detailed Information to Calls (on page 636).

The SPM page layouts corresponding to the PCD record types are described as follows:

■ A call objective plan, which is based on the Messaging Plan record type, is a plan that packages the sales team's call objectives, next call objectives, and outcomes. The call objective plan is defined by an administrator and follows an approval path for the standard selections. The call objective plan contains the predefined metadata that the sales representative selects during a product detailing session within the context of a call (Account, Contact, or Attendee Call).

■ A call objective, which is based on the Messaging Plan Item record type, is a predefined set of values that explain the purpose and goal of the visit when describing a particular product.

■ A next call objective, which is based on the Messaging Plan Item Relations record type, is a predefined set of values that describe the goal and purpose of the follow-up visits and relates to a particular product.

■ An outcome, which is based on the Message Response record type, is a predefined set of values that are approved for use by the administrator to report the response of the customer to the detailing session about the product.

Example of a Call Objective Plan

Consider a call objective plan defined for the product, Drug Z. The sales team might have a number of call objectives when they discuss Drug Z with customers, such as the following:

■ **Call Objective 1.** Launch the Drug Z product.

■ **Call Objective 2.** Introduce the benefits of Drug Z.

■ **Call Objective 3.** Discuss the safe use of Drug Z.

■ **Call Objective 4.** Describe the potential side effects of Drug Z.

The next call objectives might include the following:

■ **Next Call Objective 1**. Describe the dosages of Drug Z.

■ **Next Call Objective 2.** Review the pricing of Drug Z.

■ **Next Call Objective 3.** Improve the relationship with the physician by providing samples of Drug Z.

The outcomes that describe the detailing session responses might be as follows:

■ **Outcome 1.** Positive response.

■ **Outcome 2.** Negative response.

■ **Outcome 3.** The physician has additional questions.

■ **Outcome 4**. A follow-up visit is required.

■ **Outcome 5.** A follow-up visit is not required.

All of the SPM records in this example relate to the call objective plan that has been defined for the product, Drug Z. The sales representative picks the appropriate items at the time of the call in the Product Detailed related item section in the Call Detail page.

NOTE: To use SPM record types, your administrator must set up dynamic page layouts for the SPM and PCD record types. Selecting an SPM type can result in a different page layout from the default page layout for PCD records if your administrator has set up dynamic page layouts for this record type. For example, selecting a Call Objective type can result in a Call Objective page layout if it is set up by your administrator. For more information about setting up dynamic page layouts for this record type, see Specifying Dynamic Page Layouts and also see the topics about page layouts in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.

For more information about managing call objectives, see the following topics:

■ Selecting the Structured Product Messaging Page Layouts (on page 714)

■ Associating Call Objectives, Next Call Objectives, and Outcomes to Products Detailed in a Sales Call (on page 715)

■ Selecting the Primary Call Objective, Primary Next Call Objective, or Primary Outcome for a Detailed Product (on page 718)

For information on how Structured Product Messaging records might be used with product indications, see Example of Using Structured Product Messaging Records and Product Indications (on page 719).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Selecting the Structured Product Messaging Page Layouts

To use the structured product messaging (SPM) page layouts to manage your call objectives during product detailing sessions, you must select the appropriate Type value to determine the dynamic page layouts for SPM.

Before you begin. Your administrator must set up dynamic page layouts for SPM as described in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*. If your administrator sets up the dynamic page layouts, then selecting an SPM type results in a different page layout from the default layout for PCD record types. For example, for a Messaging Plan Item record, selecting a Call Objective type results in a Call Objective page layout. For more information on setting up dynamic page layouts, see Specifying Dynamic Page Layouts. In addition, your administrator must set up your user access profile so that you have Read-Only, View, or Inherit Primary access to the related information SPM records on the Products Detailed detail page.

To select the structured product messaging page layouts

1   Navigate to the Messaging Plan Detail page, and in the Type picklist field, select Call Objective Plan to display the Call Objective Plan page layout.

2   Navigate to the Messaging Plan Item Detail page, and in the Type picklist field, select Call Objective to display the Call Objective page layout.

3   Navigate to the Messaging Plan Item Relations Detail page, and in the Type picklist field, select Next Call Objective to display the Next Call Objective page layout.

4   Navigate to the Message Response related item section in a Call Detail page, and in the Type picklist field, select Outcome to display the Outcome page layout.

Associating Call Objectives, Next Call Objectives, and Outcomes to Products Detailed in a Sales Call

Using the Structured Product Messaging (SPM) page layouts, sales representatives can see the call objectives for their products, the outcomes expected from the sales call for their products, and they can determine their call objectives for a future visit, all of which are based solely on the product. Typically, sales representatives access these records during the product detailing session of a call with a physician to discuss one or more drugs. The details of the visit are captured in a contact call record, and the details of the drug are available in the product record.

In the Product Detailed related information section, the sales representative can pick and choose the following:

■   Call objectives (messaging plan items) from a predefined set of call objectives for a particular product or drug

■   Next call objectives (messaging plan item relations) from a predefined set of next call objectives for a particular product or drug

■   Outcomes (message responses)   from a predefined set of outcomes for a particular product or drug

For example, the following table shows the call objectives (messaging plan items) that the sales manager might set for a sales representative.

RowID	Product Name	Call Objective Name
12-1111	Drug A	Introduce the benefits of Drug A to the physician.
12-1112	Drug A	Discuss the proposed pricing and discount regime of Drug A with the physician.
12-1113	Drug A	Discuss the potential sales of Drug A with the physician for the coming year.
12-1114	Drug A	Drop off supplementary information about Drug A to the physician.
12-1115	Drug B	Inform the physician about the superiority of Drug B relative to Drug A for certain medical conditions.

RowID	Product Name	Call Objective Name
12-1116	Drug B	Drop off samples of Drug B to the physician.

Fields in the Products Detailed Related Information Section

The following fields are available only in the Products Detailed Related Information section:

- Primary Messaging Plan Item (which can be renamed Call Objective)

- Primary Messaging Plan Item Rel (which can be renamed Next Call Objective)

- Primary Message Response (which can be renamed Outcome)

In addition, the following related items are available to associate SPM (or PCD) records with the Products Detailed record:

- Call Product Detail Call Objectives (Call Product Detail Messaging Plan Items)

- Call Product Detail Next Call Objectives (Call Product Detail Messaging Plan Item Relations)

- Call Product Detail Outcomes (Call Product Detail Message Responses)

This topic refers to these related items collectively as *Call Product Detailed related items*. Call Product Detailed related items and PCD records have a   many-to-many relationship. That is, one PCD record can be associated with multiple and different Call Product Detailed related item records.

The company administrator for Oracle CRM On Demand Life Sciences Edition configures the Products Detailed Related Information section for the call page layouts for account calls, contact calls, and attendee calls. For more information on configuring the page layouts for Oracle CRM On Demand Life Sciences Edition, see the information on page layouts in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.

Before you begin. Your administrator must set up dynamic page layouts for SPM as described in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*. If your administrator sets up the dynamic page layouts, then selecting an SPM type results in a different page layout from the default layout for PCD record types. For example, for a Messaging Plan Item record, selecting a Call Objective type results in a Call Objective page layout. For more information on setting up dynamic page layouts, see Specifying Dynamic Page Layouts. In addition, your administrator must set up your user access profile so that you have Read-Only, View, or Inherit Primary access to the related information SPM records on the Products Detailed detail page.

To associate the SPM (or PCD) record types with the Products Detailed record, you must meet the following conditions:

- The products on the Call Product Detailed related items and PCD records must match.

- You must set the PCD record types as follows:

  - The Messaging Plan Item type must be set to Call Objective.

  - The Messaging Plan Item Relations type must be set to Next Call Objective.

  - The Message Response type must be set to Outcome.

These conditions are enforced when you create the associations. However, they are not enforced thereafter. Consequently:

■ Do not change the Product field on the Call Product Detailed related items after you have created an association.

■ Do not modify the Product and Type fields on the PCD records after they have been added to Call Product Detailed related items as child records.

■ Do not delete any existing association or modify the Product Detailed or PCD records and then attempt to restore the association.

To associate call objectives, next call objectives, and outcomes with products detailed in a sales call

1 In the Call Detail page for a contact call, account call, or attendee call, navigate to the Product Detailed related information section.

The Product Detailed section includes columns for the Primary Call Objective (Primary Messaging Plan Item), Primary Next Call Objective (Primary Messaging Plan Item Relations), and Primary Outcome (Primary Message Response).

2 Navigate to the row for the product that you are discussing during the sales call, and click the product name, for example, Drug A.

3 In the Product Detailed Detail page:

■ To associate a call objective with Drug A, scroll to the Call Product Detail Call Objectives (Call Product Detail Messaging Plan Items) related information section, click Select, and in the Edit page, use the Lookup selector to select the call objective (messaging plan item) for Drug A from the list of call objectives (messaging plan items), and then save the Product Detailed record.

■ To associate a next call objective with Drug A, scroll to the Call Product Detail Next Call Objectives (Call Product Detail Messaging Plan Item Relations) related information section, click Select, and in the Edit page, use the Lookup selector to select the next call objective (messaging plan item relations) for Drug A from the list of next call objectives (messaging plan item relations), and then save the Product Detailed record.

■ To associate an outcome with Drug A, scroll to the Call Product Detail Outcomes (Call Product Detail Message Responses) related information section, click Select, and in the Edit page, use the Lookup selector to select the outcome (messaging response) for Drug A from the list of outcomes (messaging responses), and then save the Product Detailed record.

NOTE: You might need to add the related information sections (in the preceding list) to the Product Detailed Detail page. For information about personalising Detail page layouts, see Changing Your Detail Page Layout (on page 855). If the sections are not available to add to your page layout, then contact your company administrator.

NOTE: SPM (or PCD) records cannot be created from within a Product Detailed detail view, but they can be associated only with the Product Detailed record. The SPM (or PCD) records must be created from the SPM (or PCD) pages and must be associated with the same product brand, for example, Drug A. Each SPM (or PCD) record can be associated with the product brand that is detailed in different calls. However, within the same call, you cannot choose the same SPM (or PCD) record for the same product being detailed. Your administrator must set up the SPM (or PCD) Detail pages as described in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.

Selecting the Primary Call Objective, Primary Next Call Objective, or Primary Outcome for a Detailed Product

You can select the primary call objective (primary messaging plan item), primary next call objective (primary messaging plan item relations), or primary outcome (primary message response) for the product being detailed using the following procedure. The call objective, next call objective, and outcome that you select as primary are displayed in the Product Detailed related item section in the Call Detail page. The purpose of the primary designation is to determine which item record is displayed first in the Products Detailed page. No special processing occurs for this designation.

Before you begin. Your administrator must set up dynamic page layouts for SPM as described in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition.* If your administrator sets up the dynamic page layouts, then selecting an SPM type results in a different page layout from the default layout for PCD record types. For example, for a Messaging Plan Item record, selecting a Call Objective type results in a Call Objective page layout. For more information on setting up dynamic page layouts, see Specifying Dynamic Page Layouts. In addition, your administrator must set up your user access profile so that you have Read-Only, View, or Inherit Primary access to the related information SPM records on the Products Detailed detail page.

To select the Primary Call Objective, Primary Next Call Objective, or Primary Outcome

1   Navigate to the Products Detailed Detail page for the product that you are detailing (for example, Drug A).

2   To designate a call objective (messaging plan item) as the primary call objective (primary messaging plan item):

   a   Edit the Products Detailed Detail page.

   b   For the Primary Call Objective (Primary Messaging Plan Item) field, use the Lookup selector to choose a call objective (messaging plan item) from the list as the primary objective.

3   To designate a next call objective (messaging plan item relations) as the primary next call objective (primary messaging plan item relations):

   a   Edit the Products Detailed Detail page.

   b   For the Primary Next Call Objective (Primary Messaging Plan Item Relations) field, use the Lookup selector to choose a next call objective (messaging plan item relations) from the list as the primary objective.

4   To designate an outcome (message response) as the primary outcome (message response):

   a   Edit the Products Detailed Detail page.

   b   For the Primary Outcome (Primary Message Response) field, use the Lookup selector to choose an outcome (message response) from the list as the primary outcome.

Example of Using Structured Product Messaging Records and Product Indications

This topic gives one example of how administrators or sales managers might set up the Structured Product Messaging (SPM) records and Product Indication records for sales representatives to detail or drop off products for customers. You might use this feature differently, depending on your business model.

1 A sales manager or administrator typically sets up the following information for the sales team:

- ■ A Call Objective Plan (Messaging Plan) for a specific product that might optionally include a specific indication (product indication)

  For information on messaging plans, see Messaging Plans (on page 694).

- ■ Product Indication records as required

  For information on production indications, see Product Indications (on page 720).

- ■ The Call Objectives (Messaging Plan Items), Next Call Objectives (Messaging Plan Item Relations), and Outcomes (Message Responses) for the Call Objective Plan, as required

  This step standardizes the call purpose and outcome, and it structures the goals of each call for the sales team.

  For information on messaging plan items, see Messaging Plan Items (on page 702). For information on messaging plan item relations, see Messaging Plan Item Relations (on page 708). For information on message responses, see Adjusting Message Responses (on page 208).

2 After the SPM records and product indications are set up, a pharmaceutical sales representative typically performs the following tasks:

- **a** Visits a physician or hospital and enters the call information in the Call Detail page for the account or contact

  For information on conducting sales calls, see Tracking Visits (Sales Calls) to Customers (on page 198).

- **b** Documents the samples or promotional items dropped for each contact, using the appropriate related information section in the Call Detail page (Samples Dropped or Promotional Items Dropped)

  For information on documenting the samples or promotional items dropped, see Linking Samples Dropped Information to Calls (on page 640) or Linking Promotional Item Information to Calls (on page 643).

- **c** Documents the products detailed for each contact or account, using the Product Detailed related information section in the Call Detail page. For each product detailed, the sales representative can do the following:

  - ■ Select the indication (product indication).

  - ■ Document additional call objectives, next call objectives, and outcomes.

  - ■ (Optional) The sales representative can identify the indication and document the appropriate call objectives, next call objectives, and outcomes.

For information on documenting products detailed, see Linking Product Detailed Information to Calls (on page 636).

d After the sales representative has selected and documented all items related to the call, the sales representative submits the call.

Product Indications

Use the Product Indication pages to create, update, and track product indications. A *product indication* is a combination of a symptom or malady and the specific product or drug that alleviates the symptom or malady. Typically, a pharmaceutical sales representative details the product indication during a call with a health practitioner. Examples of product indications are Allergy – Drug A, Asthma – Drug A, Arrhythmia – Drug B, and Heart Failure – Drug C. In this example, Drug A is used to treat the symptoms of both allergies and asthma.

A product can have zero or more indications. The Product Indication record tracks the unique combination of the product with the associated indication. If a product indication exists, then the product indication name must be unique. When displaying products detailed in a customer call, a list of product indications are available for the sales representative to select during a product detailing session. The product indications are available on the Products Detailed related information section in a Call Detail page.

A product indication is a major component of the product messaging process for a pharmaceutical sales representative. Products or drugs are typically detailed at a product level by the sales representative and not at a stock-keeping unit (SKU) level in the product inventory system. For example, Drug A can have multiple indications: one for chronic obstructive pulmonary disease (COPD), one for asthma, and so on. Each indication has its own unique call objective plan (messaging plan) and call objectives (messaging plan items). You can use the product indication to filter the appropriate related information sections for structured product messaging records, such as Call Objectives Plans (Messaging Plans) and Call Objectives (Messaging Plan Items). For more information on detailing products, using the Products Detailed related information section in a Call Detail page, see Linking Product Detailed Information to Calls (on page 636). For more information on structured product messaging (SPM), see Structured Product Messaging (on page 712).

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking product-indication information, then the Product Indication tab might be excluded from your set-up.

Working with the Product Indication Homepage

The Product Indication Homepage is the starting point for managing product indications. This page displays information that is relevant to you.

NOTE: Your company administrator can customise the layout of your Product Indication Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Before you begin. To work with product indications, your user role must include the Life Sciences - Manage Pharmaceutical Access privilege.

Creating a Product Indication

You can create a new product indication by clicking the New button in the Recently Modified Product Indications section. For more information, see Creating Records (on page 51) and Product Indication Fields (on page 724).

Working with Product Indication Lists

The Product Indication List section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for product indications.

Product Indication List	Filters
All Product Indications	All product indications to which you have visibility, regardless of who owns the product indication.
Recently Modified Product Indications	All product indications with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, see Manage Lists Page (on page 128). The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Product Indications

The Recently Modified Product Indications section shows the product indications most recently modified.

Click Show Full List to expand the list.

Adding Sections to Your Product Indication Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Product Indication Homepage:

- Recently Created Product Indications

- Recently Modified Product Indications

- My Recently Created Product Indications

- My Recently Modified Product Indications

- Additional report sections (Your company administrator can make report sections available for display on your Product Indication Homepage.)

To add sections to your Product Indication Homepage

1 On the Product Indication Homepage, click Edit Layout.

2 On the Product Indication Homepage Layout page, use the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Related Topics

See the following topics for related information about product indications:

- Product Indications (on page 720)
- Managing Product Indications (on page 722)
- Product Indication Fields (on page 724)

Managing Product Indications

For information about managing product indications, see the following topics:

- Associating Product Indication Records with Products Detailed (on page 723)
- Associating Product Indications with Structured Product Messaging Records (on page 723)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 103)
- Linking Records to Your Selected Record (on page 104)
- Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about product indications:

- Product Indications (on page 720)
- Working with the Product Indication Homepage (on page 720)

■   Product Indication Fields (on page 724)

Associating Product Indication Records with Products Detailed

You associate a product indication record typically with a product that you are detailing by using the Products Detailed related information section.

To associate product indication records with products detailed

1   Create the product indication records for the product that you are detailing.

2   Navigate to the Products Detailed related information section on the Call Detail page for the customer call, and edit the product detailed record for the product of interest.

3   For the Indication Name field, use the Lookup selector to choose a product indication name from the list of product indications that is available for the product that you are detailing.

Associating Product Indications with Structured Product Messaging Records

You associate a product indication record typically with structure product messaging (SPM) records, such as call objectives plans (messaging plans), call objectives (messaging plan items), next call objectives (messaging plan item relations), and outcomes (message responses).

To associate product indication records with structured product messaging records

1   Create the product indication records for the product that you are detailing.

2   Navigate to each SPM record type (for example, Call Objective Plan (Messaging Plan), Call Objective (Messaging Plan Item), Next Call Objective (Messaging Plan Item Relations), Outcome (Message Response), and edit the record of interest.

3   For the Indication Name field, use the Lookup selector to choose a product indication name from the list of product indication names that is available for the product that you are detailing.

NOTE: Your company administrator must set up the Indication name field on the SPM record type.

Product Indication Fields

Use the Product Indication Edit page to add a product indication or update details for an existing product indication. The Product Indication Edit page shows the complete set of fields for a product indication.

TIP: You can also edit product indications on the Product Indication List page and the Product Indication Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the product indication fields.

Field	Description
Indication Name	The name of the product indication record. Some examples are Allergy, Asthma, Arrhythmia, Heart Failure, and so on. The maximum length is 50 characters. (Required)
Product Indication Name	Read Only. A concatenation of the Product Name and the Indication Name. For example, Asthma – Drug A or Allergy – Drug A, assuming that Drug A is used to treat both asthma and allergies. This field must be unique in your company.
Product	The product name at the brand level. The brand is defined on the Product record when the product's Type field is set to Detail, for example, Drug A. Choose the product name, using the Lookup icon. The Product Indication records are sorted by Product Name. This field is required by default. NOTE: The product must be a valid product for the Product Category field.
Description	Additional details to describe the indication. The maximum length is 255 characters.
Product: Product Category	Read Only. The product category of the selected product brand. The company administrator defines the product category, for example, Antihypertensive, Antianxiety, Asthma, Marketing Promotional Items, and so on.

Orders

The Order record type, although already available in Oracle CRM On Demand, has been enhanced to improve Life Sciences functionality. You use the Order pages to create, update, and track orders and the associated order items for products. For example, sales representatives can use the Order pages to do the following:

- Create a direct request for sample fulfilment as well as submit an order to the main office for samples to be sent directly to customers.

- Place an internal order with the main office to replenish samples that have been exhausted. Sales representatives periodically run out of samples, and so they can reorder them as required.

The Order record type is linked to all custom objects and can be enabled for integration by using Web integration events and workflows. If the Orders section is not visible on a custom object detail page, click the

Edit Layout link in the upper-right corner of the page, and add the Orders section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

Before you begin: To work with orders, the Order Usage value on the company profile page must be set to CRM On Demand Order Management, and your user role must include the Enable Order Access privilege.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking orders and the associated order line item information, then the Orders tab might be excluded from your set-up.

Working with the Order Homepage

The Order Homepage is the starting point for managing orders and associated order items for products.

NOTE: Your company administrator can customise the layout of your Order Homepage. In addition, if your user role includes the Personalise Homepages privilege, then you can add sections to the page and remove sections from the page.

Before you begin. To work with orders and order items for products, the Order Usage value on the company profile page must be set to CRM On Demand Order Management, and your user role must include the Enable Order Access privilege. For more information, see Setting Up Your Company Profile and Global Defaults.

Creating an Order

The samples administrator creates a new order by clicking the New button in the My Recently Created Orders section. For more information, see Creating Records (on page 51) and Order Fields (on page 730).

Working with Order Lists

The Orders List section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for orders.

Order List	Filters
All Orders	All orders to which you have visibility, regardless of who owns the order or when it was created.
My Recently Created Orders	Filters orders, with your name in the owner field, sorted by the created date.
All Recently Created Orders	Filters all created orders to which you have visibility, sorted by the created date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Orders

The My Recently Created Orders and My Recently Viewed Orders section shows the orders that were created or viewed most recently.

Click Show Full List to expand the list.

Adding Sections to Your Order Homepage

If your user role includes the Personalise Homepages privilege, then you can add some or all of the following sections to your Order Homepage:

- Recently Created Orders

- Recently Modified Orders

- My Recently Created Orders

- My Recently Modified Orders

- Additional report sections (Your company administrator can make report sections available for display on your Order Homepage.)

To add sections to your Order Homepage

1   On the Order Homepage, click Edit Layout.

2   On the Order Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page. Click Save.

Related Topics

See the following topics for related information about orders and order items for samples:

- Orders (on page 724)

- Order Fields (on page 730)

- Managing Orders

Managing Orders

For information about managing orders, see:

- About EBIZ PIP Integration and Oracle CRM On Demand Order Management (on page 727)

- Creating an Order Item for Products (on page 728)

- Submitting an Order for Products (on page 730)

- Linking Sample Request Information to Calls (on page 645)

NOTE: The orders feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)

- Updating Record Details (on page 103)

- Linking Records to Your Selected Record (on page 104)

- Working with Lists (on page 112)

- Working with Records (on page 46)

- Transferring Ownership of Records (on page 133)

- Deleting and Restoring Records (on page 161)

- Sharing Records (Teams) (on page 134)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about orders:

- Orders (on page 724)

- Order Fields (on page 730)

- Working with the Order Homepage (on page 725)

About Ebiz PIP Integration and Oracle CRM On Demand Order Management

Oracle CRM On Demand supports two types of order management that are mutually exclusive. Administrators can select the type of order management to use by setting the Order Usage option in the Company Profile page:

- Oracle CRM On Demand Order Management, which is provided in Oracle CRM On Demand Life Sciences Edition

You cannot use Oracle CRM On Demand order management and integrate orders with Oracle E-Business Suite. To integrate orders with Oracle E-Business Suite, you must use the Ebiz PIP Integration option.

- Ebiz PIP Integration, which is the Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite integration solution

  With the Ebiz PIP Integration option, order records in Oracle CRM On Demand contain read-only header information, which allows information from Oracle E-Business Suite to be stored in Oracle CRM On Demand for display purposes only. All order and line items are created in Oracle E-Business Suite. When you select the Ebiz PIP Integration option, Oracle CRM On Demand does not track order line items.

Considerations When Migrating Ebiz PIP Integration Order Management to Oracle CRM On Demand Order Management

If you are currently using the Ebiz PIP Integration option for order management, and if you want to display the following items on Oracle CRM On Demand and provide custom object support for your customisations, then you must migrate your orders to Oracle CRM On Demand order management:

- Order Home page

- Order lists for each account or contact

- Order line item entries

In addition to migrating to Oracle CRM On Demand order management, Oracle CRM On Demand Customer Care must enable the Order and Order Item record types as well as workflows, import and export, and Web services. Oracle CRM On Demand provides integration with the Price List record type, which was previously available only in Oracle CRM On Demand for Partner Relationship Management. When migrating your orders to Oracle CRM On Demand order management, Oracle CRM On Demand Customer Care must enable the necessary privileges to make the Price List record type visible to you. After migrating your orders to Oracle CRM On Demand order management, you can customise the order records in Oracle CRM On Demand for your business logic requirements. For more information on using the Order Usage option in the company profile, see Setting Up Your Company Profile and Global Defaults.

Creating an Order Item for Products

You can use the Order pages to create and update order items for products so that you can track what products have been purchased by the customer as part of the order.

NOTE: You can also use the Sample Request pages to link sample request information to calls, see Linking Sample Request Information to Calls (on page 645). Note that if you customise the Order Detail page by adding a new field, then the new field will also be available on Sample Request pages.

Before you begin. To work with orders and order items for products, the Order Usage value on the company profile page must be set to CRM On Demand Order Management, and your user role must include the Enable Order Access privilege.

To create or update an order item for products

1 On the Order Homepage, select the order that you want.

For information on selecting orders, see Finding Records (on page 68).

2 On the Order Detail page:

■ Click New in the Order Items section to add an order line item to the order.

NOTE: You might want to add the Order Items section to your layout. For more information on changing the layout, see Changing Your Detail Page Layout (on page 855).

■ Click Edit next to an existing order line item to update that order item.

3 On the Order Item Detail or Edit page, complete the fields described in the following table, and then save the record.

Field	Description
Order Item Number	(Read-only) The unique number for this order line item.
Currency	The currency in which this order item will be processed. Use the Lookup selector to choose the currency.
Discount Amount	This field is not applicable to the current release of Oracle CRM On Demand.
Discount Percent	This field is not applicable to the current release of Oracle CRM On Demand.
Product	(Required) The product that is being ordered.
Quantity	(Required) The quantity of product that is being ordered. The value in this field cannot be negative.
Order	(Read-only) The parent order to which this order line item is linked.
Order: External Unique ID	(Read-only) The unique external ID of the parent order to which this order line item is linked.
Price	This field is not applicable to the current release of Oracle CRM On Demand.
Price after Discount	This field is not applicable to the current release of Oracle CRM On Demand.
Status	(Required) The value in this field is In Progress by default.

Related Topics

See the following topics for related information about orders:

■ Orders (on page 724)

■ Working with the Order Homepage (on page 725)

■ Managing Orders

■ Order Fields (on page 730)

Submitting an Order for Products

When you have finished creating and updating order items for an order object, you can submit the order.

Before you begin. To work with orders and order items for products, the Order Usage value on the company profile page must be set to CRM On Demand Order Management, and your user role must include the Enable Order Access privilege.

To submit an order for products

1 On the Order Homepage, select the order that you want.

For information on selecting orders, see Finding Records (on page 68).

2 On the Order Detail page, review the order items that are associated with this order for products, and make sure that you are satisfied with the information recorded.

3 Click Submit to submit the order for products, including all its associated order line items.

The value in the Order Creation Status field for the order changes to Submitted to indicate that the order for products has been submitted for processing. You cannot modify an order for products that has been submitted.

Related Topics

See the following topics for related information about orders:

- Orders (on page 724)
- Working with the Order Homepage (on page 725)
- Managing Orders
- Order Fields (on page 730)

Order Fields

Use the Order Edit page to add an order for products or update the details for an existing order for products. The Order Edit page shows all the fields for an order.

TIP: You can also edit orders on the Order Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the order fields.

Field	Description

Field	Description
Key Order Information	
Order Number	A unique number that is assigned to each order.
Type	The Order category. The default value for Type for an Order record is Order. You can choose the following values using the picklist: Sample Request and Order. **NOTE:** Your company administrator must set up this editable field to be available on the page layout because it is not available on the page layout by default.
Account	The account that is associated with this order.
Opportunity	The opportunity that is associated with this order.
Contact	The contact that is associated with this order.
Order Created	The date the order was created.
Order Creation Status	(Read-only) The value in this field is In Process by default. When you submit an order for products, the value in this field changes to Submitted.
External Unique Id	Unique external ID for order integration with Oracle CRM On Demand.
Id	The value in this field uniquely identifies the order.
Shipping Address	The address to which the order will be shipped. Use the Lookup selector to select an address. This field must be completed to create a sample request order, see Linking Sample Request Information to Calls (on page 645).
Billing Address	The billing address for the order in context.
Order Status	The status of the order, which can be one of the following: Pending, Shipped, Processed, or Submitted. You can set the status if required. When you submit the order, the order status changes to Submitted.
Additional Information	
Owner	The person who created this order record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Description	(Optional) A description of the order.

Related Topics

See the following topics for related information about orders:

- Orders (on page 724)

- Working with the Order Homepage (on page 725)

■ Managing Orders

Quotes

A quote record contains an offer to a customer for specific products and services at a specific price. Using Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite, you can start creating a quote from Oracle CRM On Demand by clicking the New Quote button in the Quotes related item section of an opportunity record. The quotes records are created and maintained within Oracle E-Business Suite and synchronised with Oracle CRM On Demand. From Oracle CRM On Demand, users can view all of the quotes that are associated with an account or opportunity that have been created through the integration pack. The integration pack uses the Quote record type in Oracle CRM On Demand. Customers who have licensed the integration pack must contact Oracle CRM On Demand Customer Care to have them set up the Quote record type.

After the quote record type is set up, you can enter or update account, account-contact, and product information in Oracle E-Business Suite and synchronize that information to Oracle CRM On Demand. You can use this data within Oracle CRM On Demand to manage sales leads and opportunities. Typically, you start creating a quote from Oracle CRM On Demand when the sales cycle progresses to the point at which a quote is required. For more information on configuring the integration pack, see *Oracle Application Integration Architecture Oracle Lead to Order Integration Pack for Oracle CRM on Demand and Oracle E-Business Suite Implementation Guide*.

Related Topics

See the following topics for related information:

■ Orders (on page 724)

■ About Ebiz PIP Integration and Oracle CRM On Demand Order Management (on page 727)

■ Opportunities (on page 315)

■ Accounts (on page 265)

Blocked Products

This feature is specific to Oracle CRM On Demand Life Sciences Edition. Use the Blocked Product pages to specify that certain products are blocked for primary contacts. You create one blocked product record for each product that you want to block for a specified primary contact. You can view the products that are blocked for a contact in a read-only list in the Blocked Products related information section of the Contact Detail page.

What Restrictions Apply to Blocked Products?

The presence of blocked product records filters the products that you can select for products detailed, samples dropped, promotional items, and sample requests during a customer call. Blocked product records prevent specified blocked products from appearing on the list of products available in the following Call Detail related items:

■ Available Products to Detail

■ Available Samples to Drop

■ Available Promotional Items to Drop

■ Available Message Plans

Blocked product records also prevent the specified blocked products from appearing on the Product Lookup window on Products Detailed or Products Edit pages. If you do not want this filtering to occur, then do not populate blocked product records.

NOTE: In earlier releases of Oracle CRM On Demand, blocked product records did not filter the products available in the Call Detail related items or the Product Lookup window when completing a customer call. To prevent blocked product records that were created before Release 22 from filtering the available products in this release, you must delete those blocked product records.

Products Are Not Blocked at the Brand Level

To prevent all items for a product brand from being dropped or discussed in a sales call, you must block all the available items for the product brand, including promotional items, informational items, or product samples. For example, to block all product items associated with Drug X for the primary contact Dr Smith, you must set up individual entries for each item that you want to block as rows of data in a Blocked Product record:

■ Dr Smith - Drug X 400 mg

■ Dr Smith - Drug X 200 mg

■ Dr Smith - Drug X promotional leaflet

■ Dr Smith - Drug X golf ball

Blocking products enables you to block some items for a product brand while not blocking other items. For example, you can block a primary contact from receiving samples of a drug, but you can allow the contact to receive promotional items about that drug, or you can allow the contact to receive 400 mg of a drug but not the 200-mg dosage.

Requirements for Blocking Products for a Primary Contact

To block products for a primary contact, your user role and access profiles must have the appropriate access to the Blocked Product record type. Also, the Blocked Product tab must be available for your role. To make the Blocked Product tab available to another user role, your user role must include the Manage Pharmaceutical Access privilege.

Working with the Blocked Product Homepage

The Blocked Product Homepage is the starting point for managing blocked products.

NOTE: Your company administrator can customise the layout of your Blocked Product Homepage. In addition, if your user role includes the Personalise Homepages privilege, then you can add sections to the page, and remove sections from the page.

Creating a Blocked Product Record

To create a blocked product record, click the New button in the Recently Modified Blocked Products section of the Blocked Product Homepage.

Working with Blocked Product Lists

The Blocked Product Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for blocked products.

Blocked Product List	Filters
All Blocked Products	All blocked products to which you have visibility.
Recently Modified Blocked Products	All blocked products to which you have visibility, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Blocked Products

The Recently Modified Blocked Products section shows the blocked products that were modified most recently.

Click Show Full List to expand the list.

Adding Sections to Your Blocked Product Homepage

If your user role includes the Personalise Homepages privilege, then you might be able to add additional report sections to your Blocked Product Homepage. Your company administrator can make report sections available for display on your Blocked Product Homepage.

To add sections to your Blocked Product Homepage

1 On the Blocked Product Homepage, click Edit Layout.

2 On the Blocked Product Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page. Click Save.

Related Topics

See the following topics for related information about blocked products:

- Blocked Products (on page 732)
- Managing Blocked Products (on page 735)
- About Displaying Lists of Blocked Products for Contacts (on page 736)
- Blocked Product Fields (on page 737)
- Dropping Samples During a Sales Call (on page 630)

Managing Blocked Products

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 103)
- Linking Records to Your Selected Record (on page 104)
- Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

- Blocked Products (on page 732)
- Working with the Blocked Product Homepage (on page 734)
- About Displaying Lists of Blocked Products for Contacts (on page 736)
- About Blocking Products and Smart Call Templates (on page 736)
- About Sample Request Item Workflows and Blocked Product Rules (on page 737)
- Blocked Product Fields (on page 737)
- Dropping Samples During a Sales Call (on page 630)

About Displaying Lists of Blocked Products for Contacts

To allow users to see the Blocked Products section on the Contact Detail page, you must add the Blocked Products related information section to the Contact Detail page layouts for the appropriate roles. You must also configure the appropriate user roles and access profiles to give users read-only access to the Blocked Products related record type for the Contact record type. For information about adding related information sections to page layouts, see Customising Static Page Layouts and Specifying Dynamic Page Layouts. For information about setting access levels for user roles and access profiles, see User Management and Access Controls.

Related Topics

- Blocked Products (on page 732)

- Working with the Blocked Product Homepage (on page 734)

- Managing Blocked Products (on page 735)

- Blocked Product Fields (on page 737)

- Dropping Samples During a Sales Call (on page 630)

About Blocking Products and Smart Call Templates

The Oracle CRM On Demand rules for blocking products do not apply to smart call templates. If you create a smart call for group or repeated usage, and if you later apply product-blocking rules to a product specified in the smart call template, then Oracle CRM On Demand does not block the product during a sample drop, product detail, or product promotion if the smart call template is used.

For example, consider the following situation:

1   You create two contacts, for example, Contact 1 and Contact 2.

2   You create a call for Contact 1, and drop a sample for Contact 1 with the product set to Sample A.

3   You save the call, using the Public Smart Call template.

4   You create a blocked product for Contact 2, with the product set to Sample A.

5   You create a call for Contact 2, and select the smart call template that you created.

In this situation, using the template automatically creates Sample A and associates it with Contact 2 and bypasses the product-blocking rule. Even though Sample A is defined as blocked for Contact 2, Sample A is available on the product lookup for Contact 2.

CAUTION: Based on the outcome of the previous example, you must use smart call templates carefully when blocking products. If product-blocking rules are added after you have set up smart call templates, then you must change your reporting mechanism manually for product disbursement. If you block products in your company, then it is recommended that you create your smart call template after the product-blocking rule has been defined, and add the product to the smart call if it is not blocked for that specific customer.

About Sample Request Item Workflows and Blocked Product Rules

Processing blocked products is not supported for sample request items when workflows are used in Oracle CRM On Demand. For example, in the following situation, a workflow created for a sample request item sets the Product field for the sample request item with a blocked product, Prod1:

1 You create the following records:

- Account: Acc1

- Contact: Con1 with Address

- Products: Prod1 and Prod2

2 You allocate Prod1 and Prod2 to an administrative user.

3 You create a blocked product record for Prod1 and Con1 so that Prod1 is defined as a blocked product for the contact Con1.

4 You create a workflow for a sample request item with a When New Record Saved trigger and an Update Values action with Field Name set to Product and its value set to Prod1.

5 From Acc1, you create a call and then you create a sample request in the Sample Request section in the call with Con1 as the contact in a call.

6 In the Sample Request section, you click New on Sample Request Item, and populate the fields as follows:

- Order Item Number: 1

- Quantity: 1

- Product: Prod2

    NOTE: Only Prod2 is visible because Prod1 is blocked for the contact Con1.

7 Save the record.

Because Prod1 is blocked, you might expect that the sample request item workflow would not set the Product field to Prod1. However, although the workflow action that you set up in step 4 is triggered, the workflow does not follow the product-blocking rule. Consequently, the workflow sets the Product field for the sample request item with the blocked product, Prod1.

Blocked Product Fields

The Blocked Product Edit page shows the complete set of fields for a blocked product.

TIP: You can also edit blocked products on the Blocked Product List page and the Blocked Product Detail page. For more information about updating records, see Updating Record Details.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the blocked product fields.

Field	Description
Product	The product that you want to block.
Contact	The contact for whom you want to block the product.

Related Topics

- Blocked Products (on page 732)

- Working with the Blocked Product Homepage (on page 734)

- Managing Blocked Products (on page 735)

- About Displaying Lists of Blocked Products for Contacts (on page 736)

- Dropping Samples During a Sales Call (on page 630)

10 Wealth Management

Oracle CRM On Demand provides the following record types for wealth management:

- **Financial Accounts.** Use these pages to manage financial account information.

- **Financial Account Holders.** Use these pages to manage information about holders of financial accounts.

- **Financial Account Holdings.** Use these pages to manage the transactions of a single financial product for a financial account.

- **Financial Plans.** Use these pages to manage the financial plans of a contact or business for one or more specific financial accounts.

- **Financial Products.** Use these pages to manage financial product information.

- **Financial Transactions.** Use these pages to track the transactions for a specific financial account.

- **Portfolios.** Use these pages to manage portfolio accounts.

- **Households.** Use these pages to manage information for a group of related contacts, who live in the same household.

Note: All of these record types are available only with Oracle CRM On Demand Financial Services Edition.

Households

Use the Household pages to create, update and track household records. You can also use the Household pages to add appointments, tasks, opportunities and service requests directly associated with the household.

A *household* is a group of contacts generally sharing a common link or association such as a family (parents and children) who live at the same address within the same house. A household allows contacts to be grouped together and can track the contact groupings, allowing a contact to be grouped in to one or more households or contact groups. Financial institutions and individual users, such as bankers, advisors and relationship managers, have many different uses for grouping contacts. The related information for households can be accumulated from the contacts who are linked to the household.

A household provides valuable segmentation information on the household as a whole, as well as a summary of information about the household member contacts. You can use the Households pages to identify and capture demographic information about a household. You can also use the Household pages to review customer's financial accounts, products and contact information that is associated with that household. This information allows you to assess customers' data.

Grouping all of a client's accounts by household allows a financial institution to identify a client's value to the organisation and seek opportunities to cross-sell and upsell additional products and services to the client, such as homeowner's insurance and loans for children's education. In addition, the ability to view all of a

customer's financial accounts by household allows a financial institution to view the household's overall financial position.

Subaccounts and Related Information for Households

You can use the Household pages to identify and profile a household. You can also use the Household pages to review a household's subaccounts and other related information including:

- **Contacts.** Contacts can be related to a household. On the Household page, you can view all contacts related to a household. For information on contacts, see Contacts (on page 289).

- **Activities.** Appointments or tasks can be related to a household either directly or through the household contacts. On the Household page, you can view all the activities related to a household and you can create new activities directly for the household. When you create a new appointment or task from the Household page, the values for Household Name and Primary Contact of the household are used by default. For more information on activities, see Activity Fields (on page 222).

- **Opportunities.** Opportunities can be related to a household either directly or through the household contacts. On the Household page, you can view all the opportunities related to a household, and you can create new opportunities directly for the household. When you create a new opportunity from the Household page, the values for Household Name and Primary Contact of the household are used by default. For more information on opportunities, see Opportunities (on page 315).

- **Service Requests.** Service requests can be related to a household either directly, or through the household contacts. On the Household page, you can view all the service requests related to a household, and you can create new service requests directly for the household. When you create a new service request from the Household page, the values for Household Name and Primary Contact of the household are used by default. For information of service requests, Service Requests (on page 414).

- **Claims.** Claims can be related to a household. On the Household page, you can view all claims related to a household. For information on claims, see Claims (on page 785).

- **Financial Plans.** Financial plans can be related to a household. On the Household page, you can view all financial plans related to a household. For information on financial plans, see Financial Plans (on page 766).

- **Policy Holders.** Policy holders can be related to a household. On the Household page, you can view all policy holders related to a household. For information on policy holders, see Policy Holders (on page 809).

- **Financial Account Holders.** Financial account holders can be related to a household. On the Household page, you can view all financial account holders who are related to a household. For information on financial account holders, see Financial Account Holders (on page 760).

- **Household Team.** Users can be part of the team related to a household. On the Household page, you can view all team members (users) related to a household.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking household information, the Households tab might be excluded from your setup.

Working with the Household Homepage

The Household Homepage is the starting point for managing households.

NOTE: Your company administrator can customise the layout of your Household Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Household

You can create a household by clicking the New button in the My Recently Viewed Households section. For more information, see Creating Records (on page 51) and Household Fields (on page 744).

Working with Household Lists

The Household Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for Households.

Household List	Filters
Recently Modified Households	All households with your name in the Owner field, sorted by the modified date
All Households	All households to which you have visibility regardless of who owns the household

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Households

The My Recently Viewed Households section shows the households that you viewed most recently.

To expand the list, click Show Full List.

Adding Sections to Your Household Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Household Homepage:

- Recently Created Households

- Recently Modified Households

- My Recently Created Households

- My Recently Modified Households

- One or more report sections (Your company administrator can make report sections available for display on your Household Homepage.)

To add sections to your Household Homepage

1 On the Household Homepage, click Edit Layout.

2 On the Household Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Related Information

See the following topics for related Household information:

- Households (on page 739)
- Managing Households (on page 742)
- Household Fields (on page 744)

Managing Households

To manage households, do the following tasks:

- Profiling Households (on page 743)
- Tracking Household Members (on page 743)

NOTE: This feature is not part of the standard application, so it might not be available in your version of Oracle CRM On Demand.

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 103)
- Linking Records to Your Selected Record (on page 104)
- Working with Lists (on page 112)
- Transferring Ownership of Records (on page 133)
- Adding Notes (on page 143)
- Attaching Files and URLs to Records (on page 150)
- Deleting and Restoring Records (on page 161)
- Merging Records (on page 138)
- Sharing Records (Teams) (on page 134)

■ Viewing Audit Trails for Records (on page 164)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related Household information:

■ Households (on page 739)

■ Working with the Household Homepage (on page 740)

■ Household Fields (on page 744)

Profiling Households

You can profile households by updating the information in household records.

To profile a household

1 Select the household.

   For instructions on selecting households, see Finding Records (on page 68).

2 On the Household Detail page, click Edit.

3 On the Household Edit page, fill in the information. For a description of the fields, see Household Fields (on page 744).

Tracking Household Members

To track members for households, add them as contacts within the household.

To track household members

1 Select the household record.

   For instructions on selecting household records, see Finding Records (on page 68).

2 On the Household Details page, scroll down to the Contacts section and click Add.

NOTE: You might want to add the Contacts section to your layout. For information on changing the layout, see Changing Your Detail Page Layout (on page 855).

3 On the Contact List page, click the Lookup icon in the New Contact field. This launches the Search for Contact window.

4 In the Search for Contact window, select a contact.

5 On the Contact List page, select the relation to the household for the contact in the Relationship drop-down list.

Field	Description
New Contact	The contact name for the household. Select the contact in the Search for Contact window.
Relationship	The contact's relationship to the household. You can select many predefined relationships, for example: Head, Spouse, Child, In-Law, 2nd Generation Child, Boss and so on.
Rollup	Select the Rollup checkbox to select a subset of contacts to rollup into the household financial totals (for example, Total Net Worth or Total Income). Contacts not selected are not rolled up into any of the totals for households, or for any related list such as Opportunities, Portfolios, Activities or Notes. Rollup is selected by default. **Note:** The Rollup checkbox on the Contact Detail page and the Household Detail page are the same, so a change on one page is reflected in the other page.

6 Click Save on the Contact List page.

7 Drill down in the New Contact field to select a contact, and then select the relation to the household for the contact in the Relationship picklist.

For information on Household fields, see Household Fields (on page 744).

NOTE: Your administrator can customise the Household Contact record type by adding custom fields and also custom related information fields that have Contact or Household as the related record type.   Your administrator can include the new custom fields and custom related information fields in the Household Contact page layout. You can edit custom fields in Household Contact related information sections, but you cannot edit custom related information fields. For information about custom related information fields and how to create them, see About Custom Related Information Fields and Creating Custom Related Information Fields.

Household Fields

Use the Household Edit page to add a household or update details for an existing household. The Household Edit page shows the complete set of fields for a household.

NOTE: Company administrators can customise your application in a variety of ways, such as changing names for record types, fields and options in picklists. Therefore, the information that you see might differ from the standard information described in this table.

The following table provides additional information regarding some fields. Many fields on the Household pages are read-only because they are calculated from the contact records linked to the household with the Roll Up field selected. Additive fields, such as Total Assets, are totalled from all contacts with the Roll Up field checked in the household. Non-totals fields, such as addresses, are usually rolled up from the primary contact in the household.

If there are no contact records linked to the household, you can add contacts to the household record, see Tracking Household Members (on page 743).

Field	Description
Key Household Information	
Household Name	Limit of 50 characters.
Primary	Read-only.
Household Detail Information	
Type	Default values are: Family - Children, Family - No Children, Family - Senior Citizen, Single, Single Parent Family, Family, Extended Family, Unmarried Couple, Empty Nest, Retired and Other.
Segment	Default values are: White Collar, Blue Collar, Rural, Own Residence, Tenant, Rural/Farming, Mass Retail, Mass Affluent, High Net Worth, Pentamillionaires and Ultra High Net Worth.
Last Activity	Read-only. Reflects the date of the last activity linked to the household.
Head of Household DOB	Read-only.
Additional Information	
Account	Read-only.
Contact	Read-only.
Owner	The owner of the household record.
	Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access.
	The value in the Owner field affects which records are included in reports that you or your managers run from Reports and Dashboard pages.
	Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on

Field	Description
	page 47).
Household Financial Profile	
Total Income	The total income for all contacts that roll up into the household. Read-only.
Total Assets	The total assets for all contacts that roll up into the household. Read-only.
Total Expenses	The total expenses for all contacts that roll up into the household. Read-only.
Total Liabilities	The total liabilities for all contacts that roll up into the household. Read-only.
Total Net Worth	The total net worth for all contacts that roll up into the household. Read-only.
Investment Risk Profile	
Risk Profile	Populated from the primary contact record of the household. Read-only.
Experience Level	Populated from the primary contact record of the household. Read-only.
Investment Horizon	Populated from the primary contact record of the household. Read-only.
Current Investment Mix	Populated from the primary contact record of the household. Read-only.
Objective	Populated from the primary contact record of the household. Read-only.
Primary Goal	Populated from the primary contact record of the household. Read-only.

Related Information

See the following topics for related Household information:

- Households (on page 739)
- Working with the Household Homepage (on page 740)
- Managing Households (on page 742)
- Sharing Records (Teams) (on page 134)

Portfolios

Use the Portfolios pages to create, update, and track any type of portfolio. Portfolios can be any type of information related to a contact that you want to track.

Portfolios can represent the following:

■ **Financial accounts.** A brokerage account, loan, or a credit card

■ **Insurance contracts.** A life insurance policy or an annuity

You can use the Portfolio pages to identify and profile a portfolio.

TIP: You can use the financial account record type and financial account hierarchy to track financial account groups, which are also known as portfolios. For more information about financial accounts, see Tracking Parent Financial Accounts (on page 758).

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking financial account information, the Portfolios tab might be excluded from your setup.

Working with the Portfolio Account Homepage

The Portfolio Account Homepage is the starting point for managing portfolio accounts.

NOTE: Your company administrator can customise the layout of your Portfolio Account Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Portfolio Account

You can create a portfolio account by clicking the New button in the My Recently Viewed Portfolios section. For more information, see Creating Records (on page 51) and Portfolio Account Fields (on page 751).

Working with Portfolio Account Lists

The Portfolio Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for portfolio accounts.

Portfolio List	Filters
All Portfolio Accounts	All portfolio accounts to which you have visibility
Recently Created Portfolios	All portfolio accounts to which you have visibility, sorted by the created date

Portfolio List	Filters
Recently Modified Portfolios	All portfolio accounts to which you have visibility, sorted by the modified date
My Recently Modified Portfolios	All portfolio accounts that you recently modified.
My Recently Created Portfolios	All portfolio accounts that you recently created.
My Portfolio Accounts	All portfolio accounts with your name in the Owner field

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Note: The availability of the Vehicles and Asset record types in the Portfolio Account listing is controlled by the Exclude Vehicle/Asset Records from Portfolio Accounts option on the company profile. For more information, see Setting Up Your Company Profile and Global Defaults.

Viewing Recently Modified Portfolio Accounts

The My Recently Viewed Portfolios section shows the portfolio accounts that you viewed most recently.

Adding Sections to Your Portfolio Account Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Portfolio Account Homepage:

- Recently Created Portfolios

- Recently Modified Portfolios

- My Recently Created Portfolios

- My Recently Modified Portfolios

- One or more report sections (Your company administrator can make report sections available for display on your Portfolio Account Homepage.)

To add sections to your Portfolio Account Homepage

1 On the Portfolio Account Homepage, click Edit Layout.

2 On the Portfolio Account Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Related Information

See the following topics for related portfolio account information:

■ Portfolio Account Fields (on page 751)

■ Managing Portfolio Accounts (on page 749)

Managing Portfolio Accounts

To manage portfolio accounts, do the following tasks:

■ Tracking Key Contacts for Portfolio Accounts (on page 750)

■ Specifying Portfolio Subaccounts (on page 750)

NOTE: This feature is not part of the standard application, so it might not be available in your version of Oracle CRM On Demand.

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

■ Linking Records to Your Selected Record (on page 104) (including referrals)

■ Sharing Records (Teams) (on page 134)

■ Transferring Ownership of Records (on page 133)

■ Adding Notes (on page 143)

■ Attaching Files and URLs to Records (on page 150)

■ Deleting and Restoring Records (on page 161)

■ Renaming Record Types

■ Merging Records (on page 138)

■ Managing Calendars and Activities (on page 185)

■ Process of Setting Up Books

■ Creating Web Applets for Record Types

■ Viewing Audit Trails for Records (on page 164)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related Portfolio Account information:

■ Working with the Portfolio Account Homepage (on page 747)

■ Portfolio Account Fields (on page 751)

Tracking Key Contacts for Portfolio Accounts

To track key contacts for portfolio accounts, add them as contacts linked to the portfolio account record.

To track key contacts for portfolio accounts

1 Select the portfolio account record.

For instructions on selecting portfolio accounts, see Finding Records (on page 68).

2 On the Portfolio Account Details page, scroll down to the Contacts section and click Add.

NOTE: You might want to add the Contacts section to your layout. For more information, see Changing Your Detail Page Layout (on page 855).

3 On the Contact List page, click the Lookup icon next to the Name column.

4 In the Lookup window, you can click New to create a new contact record or select an existing contact.

5 On the Contact List page, fill in the information as required.

6 Save the record.

Specifying Portfolio Subaccounts

You can indicate portfolio account hierarchies, such as a mutual fund that is within a life insurance policy or a brokerage account, by specifying a parent-child relationship. First create the parent portfolio account, and then select that account as the parent for the child or portfolio subaccount.

Portfolios have one-to-many relationship with portfolio subaccounts. For example, you can have many mutual fund or stock subaccounts for the brokerage portfolio account.

To create a portfolio subaccount

1   Select the parent portfolio account.

    For information on selecting portfolio accounts, see Finding Records (on page 68).

2   On the Portfolio Account Details page, scroll to the Portfolio Sub-Accounts section and click New.

    NOTE: You might have to add the Portfolio Sub-Accounts section to your layout. For information on changing the layout, see Changing Your Detail Page Layout (on page 855).

3   Complete the fields in the Portfolio Account Edit page that is launched.

4   Save the record.

To specify the parent portfolio account

1   Select the child portfolio subaccount.

    For instructions on selecting portfolio accounts, see Finding Records (on page 68).

2   On the Portfolio Account Edit page, click the Lookup icon next to the Parent Portfolio Account field.

3   In the Lookup window, select the parent portfolio account.

4   Save the record.

Portfolio Account Fields

Use the Portfolio Account Edit page to add a portfolio account or update details for an existing portfolio account. The Portfolio Account Edit page shows the complete set of fields for a portfolio account.

NOTE: Company administrators can customise your application in a variety of ways, such as changing names for record types, fields and options in picklists. Therefore, the information that you see might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Account Information	
Account Number	Required field. Limit of 100 characters.
Institution	Lookup field for the institution linked with this portfolio account.
Product	Lookup field for the product linked with this portfolio account.

Field	Description
Account Type	A picklist of available account types. Default values are: Annuity Contract, Group Policy, 401K, Checking, IRA, Life Insurance, Mutual Fund, Savings and Other.
Primary Contact	Read-only.
Account	Lookup field for the account linked with this portfolio account.
Revenue	Revenue linked with this portfolio account.
Purchase Date	The date that the financial account is opened.
Cancelled/Sold Date	The date that the account is closed. If this is an individual holding, it may be the date that all shares are sold.
Status	Status of the portfolio account. Default values are: Active, Pending, Quote, Terminated and Closed.
Parent Portfolio Account	The parent portfolio account for the current portfolio account.
Owner	The owner of the portfolio account record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. The value in the Owner field affects which records are included in reports that you or your managers run from Reports and Dashboard pages. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Primary Group	Primary group of the portfolio owner. For releases previous to release 13, this field is used to define Group visibility to Portfolio records. It is recommended that you use the book functionality to replace this capability. For more information, see Process of Setting Up Books.
Policy Information	
Risk Class	Defines the risk level of the portfolio. Limit of 50 characters.
Premium	The cost of the insurance policy in your currency units.
Face Value	The face value of the insurance policy in your currency units.
Effective Date	The start date for the insurance policy.
Expiration Date	The expiry date for the insurance policy.
Investment Information	

Field	Description
Total Asset Value	The value of all your investments in your currency units.
Valuation Date	The date of the valuation of your total assets.
Loan Information	
Loan Amount	The value of your loan in your currency units.
Annual % Rate	The interest rate for your loan.
Maturity	The date on which the loan is due for payment.
Term	Read-only. The concatenation of Term Length and Term Unit.
Term Length	The period of time over which the loan is amortised, usually expressed in months.
Term Unit	The picklist of possible term units. The default values are: Day, Week, Month, and Year.
Credit Card Information	
Credit Limit	The maximum credit available for the account.
Annual % Rate	The annual interest rate charged on charges placed on the balance.

Portfolio Contact Fields

The following table provides information about some fields that your company administrator may make available and which you might see under the Contacts related record for a portfolio account.

Field	Description
Primary Insured	This check box indicates that the person is generally the intended policy owner and the person who fills out and signs a request for insurance coverage.
Owner	This check box indicates the owner of the property being insured.
Named Insured	This check box indicates the named individual with whom an insurance contract is made, and whose interests are protected under the policy.

NOTE: Your administrator can customise the Contact Portfolio record type by adding custom fields and also custom related information fields that have Contact or Portfolio as the related record type.   Your administrator can include the new custom fields and custom related information fields in the Contact Portfolio page layout. You can edit custom fields in Contact Portfolio related information sections, but you cannot edit custom related information fields. For information about custom related information fields and how to create them, see About Custom Related Information Fields and Creating Custom Related Information Fields.

Related Information

See the following topics for related Portfolio Account information:

■ Working with the Portfolio Account Homepage (on page 747)

■ Managing Portfolio Accounts (on page 749)

Financial Accounts

Use the Financial Account pages to create, update, and track any type of financial account. Financial accounts are typically the financial accounts of a contact or business that the financial institution manages. However, financial accounts can also track all financial accounts of a contact or business, including those accounts at other financial institutions.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking financial account information, the Financial Accounts tab might be excluded from your setup.

A *financial account* is a record of the financial transactions between financial institutions. It contains financial products for which the financial institution has a specific fiduciary responsibility. Financial accounts provide a structure for financial institutions to manage both contact and business relationships.

NOTE: Within Oracle CRM On Demand Financial Services Edition, *Account* is renamed *Business Account.* Business accounts represent a legal entity such as a business, company, or trust. They provide parent and child relationships to support divisions, departments, and other complex legal structures.

You use financial accounts to track any financial accounts types, such as savings, checking, mortgage, certificates of deposit, credit cards, demand deposit accounts, investments, loans, retirement, education, and so on.

Using financial accounts, financial institutions can move from financial account-centric to client and household-centric relationships. Using this feature, you can access high-level financial account information that is contained in the Financial Account Type, Balance, and Joint fields to support client and household-centric relationships, including activities, opportunities, service requests, and calendars. Financial accounts also support accounts hierarchies and subaccounts. These hierarchies allow the grouping of accounts into portfolios. You use the grouping of accounts to group financial accounts into portfolios. The following figures show some examples of hierarchies. Figure 1 shows a parent and child relationship for a financial account. Figure 2 shows a portfolio account and financial account relationship. Figure 3 shows a financial account and subaccount relationship.
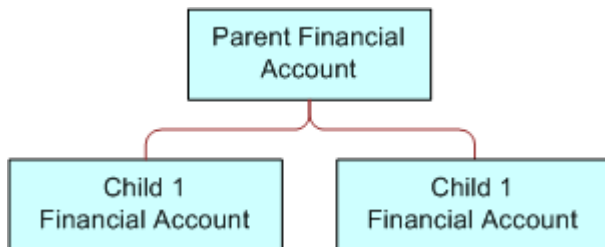
Figure 1: Parent and Child Relationship for Financial Account
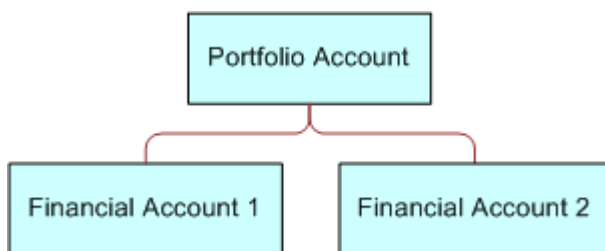
Figure 2: Portfolio Account and Financial Account Relationship
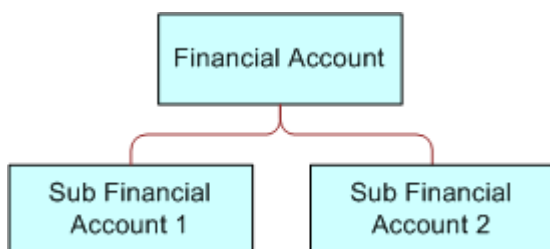
Figure 3: Financial Account and Subaccount Relationship

You can use the Financial Account pages to identify and profile a financial account. You can also use the Financial Account pages to review a financial account's subaccounts and other related information including:

- Financial Account Holders (on page 760)

- Financial Account Holdings (on page 763)

- Financial Transactions (on page 776)

■ Financial Plans (on page 766)

■ Policies (on page 805)

■ Opportunities **(on page 315).** On the Financial Account pages, you can view all opportunities related to a financial account.

■ Activities**.** On the Financial Account pages, you can view all activities related to a financial account.

■ Service Requests **(on page 414).** On the Financial Account pages, you can view all service requests related to a financial account.

■ Leads **(on page 238).** On the Financial Account pages, you can view all leads related to a financial account.

Working with the Financial Account Homepage

The Financial Account Homepage is the starting point for managing financial accounts.

NOTE: Your company administrator can customise the layout of your Financial Account Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Financial Account

You can create a financial account by clicking the New button in the Recently Modified Financial Accounts section. For more information, see Creating Records (on page 51) and Financial Account Fields (on page 758).

Working with Financial Account Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for financial accounts.

Financial Account List	Filters
All Financial Accounts	All financial accounts to which you have visibility
Recently Modified Financial Accounts	All financial accounts that you recently modified.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Financial Accounts

The Recently Modified Financial Accounts section shows the financial accounts that were modified most recently.

To expand the list, click Show Full List.

Adding Sections to Your Financial Account Homepage

If your user role includes the Personalise Homepages privilege, you might be able to add additional sections to your Financial Account Homepage, depending on what your company administrator has made available for display on your Financial Account Homepage.

The following procedure describes how to add sections to your Financial Account Homepage.

To add sections to your Financial Account Homepage

1 On the Financial Account Homepage, click Edit Layout.

2 On the Financial Account Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Managing Financial Accounts

To manage financial accounts, do the following tasks:

■ Tracking Parent Financial Accounts (on page 758)

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related financial account information:

■ Working with the Financial Account Homepage (on page 756)

■ Financial Account Fields (on page 758)

Tracking Parent Financial Accounts

To allow tracking of a financial account's parent financial account, add the parent financial account to the Parent Financial Account Field on the child financial account.

To track a parent financial account

1 Select the financial account.

For information on selecting financial accounts, see Finding Records (on page 68).

2 On the Financial Account Detail page, click Edit.

3 On the Financial Account Edit page, select the Parent Financial Account field, and select a financial account.

Financial Account Fields

Use the Financial Account Edit page to add a financial account, or update details for an existing financial account. The Financial Account Edit page shows the complete set of fields for a financial account.

TIP: You can indicate financial account hierarchies, such as a retirement financial account, which is a subsidiary of a portfolio financial account, by selecting Financial Account. For more information about indicating hierarchies, see Tracking Parent Financial Accounts (on page 758).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Financial Account Profile	
Financial Account Number	The number of the financial account. This field has a limit of 50 characters.
Financial Account Type	The financial account type such as Savings, Credit, Mortgage, Investment, Wealth, Education, Insurance.
Primary Account	The check box is used to indicate that this financial account is the primary financial account.
Home Branch	The home branch for the financial account within the financial institution.
Financial Account	The name of the financial account. This field has a limit of 50 characters.

Field	Description
Open Date	The date on which the financial account was opened at the financial institution.
Joint	The check box used to specify that the financial account has joint ownership. More than one contact shares the ownership of the financial account.
Held Away	The check box is used to indicate that this financial account is being held away. *Held away* means that this financial account is not held by this financial institution, but is held at another financial institution.
Balance	The currency field representing the financial account's balance.
Balance as of	The date and time when the balance was last updated.
Financial Account Details	
Integration ID	The integration ID of the external information about the financial account. This field has a limit of 50 characters.
Held Away Institution	The name of the financial institution at which this financial account is being held away at.
Parent Financial Account	The parent financial account for this child financial account.
Financial Account Integration	
Description	The detailed description of the financial account.
External ID	The external source ID of the external information about the financial account. This field has a limit 50 characters.
External Last Updated	The date and time when the data for this financial account was last updated (from the external source).
External Source	The source of the external information about the financial account holding, for example, an application name, database name, integration name, and so on.
Additional Information	
Owner	The owner of the financial account record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

Related Topics

See the following topics for related Financial Account information:

■ Working with the Financial Account Homepage (on page 756)

■   Managing Financial Accounts (on page 757)

Financial Account Holders

Use the Financial Account Holder pages to create, update, and track the relationship between a financial account and its holders. A *financial account holder* is any contact who has a relationship with the financial account (typically, the legal owner of the financial account.)

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking financial account holder information, the Financial Account Holder tab might be excluded from your setup.

A financial account holder record tracks the relationships between contacts and financial accounts, enabling a complete understanding of which contacts are related to which financial accounts, and which financial accounts are related to which contacts.

Using financial account holders, financial institutions and users can track the relationship between contacts and financial accounts, and can track specific attributes and details of the relationship. Financial account holders track the role of a contact in relation to a financial account, such as the legal owner, guardian, advisor, benefactor, and so on.

Working with the Financial Account Holder Homepage

The Financial Account Holder Homepage is the starting point for managing financial account holders.

NOTE: Your company administrator can customise the layout of your Financial Account Holder Homepage. In addition, if your user role includes the Personalise Homepages privilege you can add sections to the page, and remove sections from the page.

Creating a Financial Account Holder

You can create a financial account holder by clicking the New button in the Recently Modified Financial Account Holders section. For more information, see Creating Records (on page 51) and Financial Account Holder Fields (on page 762).

Working with Financial Account Holder Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for financial account holders.

Financial Account Holder List	Filters
All Financial Account Holders	All financial account holders to which you have visibility, regardless of who owns the financial account holder

Financial Account Holder List	Filters
Recently Modified Financial Account Holders	All financial account holders, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Financial Account Holders

The Recently Modified Financial Account Holders section shows the financial account holders that were modified most recently.

To expand the list, click Show Full List.

Adding Sections to Your Financial Account Holders Homepage

If your user role includes the Personalise Homepages privilege, you might be able to add additional sections to your Financial Account Holder Homepage, depending on what your company administrator has made available for display on your Financial Account Holder Homepage.

The following procedure describes how to add sections to your Financial Account Holder Homepage.

To add sections to your Financial Account Holder Homepage

1   On the Financial Account Holder Homepage, click Edit Layout.

2   On the Financial Account Holder Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3   Click Save.

Related Information

See the following topics for related financial account holder information:

- Managing Financial Account Holders (on page 761)

- Financial Account Holder Fields (on page 762)

Managing Financial Account Holders

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 103)
- Linking Records to Your Selected Record (on page 104)
- Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

- Working with the Financial Account Holder Homepage (on page 760)
- Financial Account Holder Fields (on page 762)

Financial Account Holder Fields

Use the Financial Account Holder Edit page to add a financial account holder, or to update details of an existing financial account holder. The Financial Account Holder Edit page shows the complete set of fields for a financial account holder.

TIP: You can also edit financial account holder information on the Financial Account Holder List page and the Financial Account Holder Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Financial Account Holder Profile	
Financial Account Holder Name	The name of the financial account holder (usually a contact). This field has a limit of 100 characters.
Financial Account	The financial account with which the financial account holder is associated.
Role	The role of the financial account holder. A financial account holder can have more than one role. Some example roles are: Legal Guardian, Owner, Lawyer, and Influencer.
Primary Contact	Indicates whether the financial account holder is the primary contact for the financial account.

Field	Description
Joined	The date on which the financial account holder was first associated with the financial account. This might be different from the Open Date on the financial account. For example, a legal guardian might be assigned to (or given responsibility for) a financial account, after the date when the financial account was opened.
External ID	The external source ID of the external information about the financial account holder. This field has a limit of 50 characters.
External Source	The source of the external information about the financial account holder, for example, an application name, database name, integration name, and so on. This field has a limit of 50 characters.
External Last Updated	The date and time when the data for this financial account holder was last updated (from the external source).

Related Topics

See the following topic for related information:

■ Working with the Financial Account Holder Homepage (on page 760)

Financial Account Holdings

Use the Financial Account Holding pages to create, update, and track financial products held by a specific financial account. Financial account holdings are typically the total of all financial account transactions of a single financial product for a financial account.

Financial account holdings enable you to know which financial products are held by each financial account. Financial account holdings can be used to track all types of financial products, such as the following:

■ Physical assets (for example, house, art, and car)

■ Financial instruments (for example, bond, stock, and mutual fund)

■ Financial services and loans (for example, mortgage, line of credit)

■ Any other instrument defined by you within financial products

Using financial account holdings, financial institutions can deliver summary information about customer financial accounts from their middle-office or back-office applications. This information provides views that are based on clients or households. Detailed information about the financial account holdings is available to you within Oracle CRM On Demand when you are managing the relationship with the client, such as the quantity, prices, performance, and important dates (such as the purchase date).

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking financial account information, the Financial Account Holding tab might be excluded from your setup.

Working with the Financial Account Holding Homepage

The Financial Account Holding Homepage is the starting point for managing financial account holdings.

NOTE: Your company administrator can customise the layout of your Financial Account Holding Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Financial Account Holding

You can create a financial account holding by clicking the New button in the Recently Modified Financial Account Holdings section. For more information, see Creating Records (on page 51) and Financial Account Holding Fields (on page 765).

Working with Financial Account Holding Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for financial account holdings.

Financial Account Holding List	Filters
All Financial Account Holdings	All financial account holdings to which you have visibility, regardless of who owns the financial account holding
Recently Modified Financial Account Holdings	All financial account holdings, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Financial Account Holdings

The Recently Modified Financial Account Holdings section shows the financial account holdings that were most recently modified.

To expand the list, click Show Full List.

Adding Sections to Your Financial Account Holding Homepage

If your user role includes the Personalise Homepages privilege, you might be able to add additional sections to your Financial Account Holding Homepage, depending on what your company administrator has set up.

The following procedure describes how to add sections to your Financial Account Holding Homepage.

To add sections to your Financial Account Holding Homepage

1 On the Financial Account Holding Homepage, click Edit Layout.

2 On the Financial Account Holding Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Managing Financial Account Holdings

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related information:

■ Financial Account Holding Fields (on page 765)

Financial Account Holding Fields

Use the Financial Account Holding Edit page to add a financial account holding, or update details for an existing, financial account holding. The Financial Account Holding Edit page shows the complete set of fields for a financial account holding.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information about some fields.

Field	Description
Financial Account Holdings Profile	
Financial Account	The financial account associated with the financial account holding.

Field	Description
Financial Product	The financial product associated with the financial account holding.
Financial Account Holdings Name	The unique name of the financial account holding.
Quantity	The number of financial product units of the holdings of this financial product for this financial account. This information usually comes from an external source.
Purchase Price	The purchase price of the holdings of this financial product for this financial account. This information usually comes from an external source.
Purchase Date	The date when the holdings of this financial product for this financial account were purchased. This information usually comes from an external source.
Value	The value of the holdings (that is, the purchase price multiplied by the quantity). This information usually comes from an external source.
Performance	The percentage gain or loss of the holdings of this financial product for this financial account. This information usually comes from an external source.
Financial Account Holdings Integration	
Integration ID	The integration ID of the external information about the financial account holdings. This field has a limit of 50 characters.
External ID	The external source ID of the external information about the financial account holdings. This field has a limit of 50 characters.
External Source	The source of the external information about the financial account holding, for example, an application name, database name, integration name, and so on.
External Last Updated	The date and time when the data for this financial account holding was last updated (from an external source).

Financial Plans

Use the Financial Plan pages to create, update, and track financial plans for a financial account. *Financial plans* are typically the financial plan of a contact or business for one or more specific financial accounts that a financial institution manages.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking financial-account plan information, the Financial Plan tab might be excluded from your setup.

A financial plan enables high-level financial planning by providing access to information like the status, stage of plan, and approvals. It also provides links to the middle-office and back-office applications. Batch feeds and updates from Web services are commonly used to integrate middle-office and back-office information in Oracle CRM On Demand.

Using financial plans, financial institutions can integrate customer relationship management with financial planning tasks, workflows, and deliverables throughout the entire financial-planning lifecycle.   Using this feature, you can track activities, opportunities, service requests and leads for a financial plan to enable client and household-centric financial planning.

You can use the Financial Plan pages to identify and profile a financial plan. You can also use the Financial Plan pages to review a financial plan's subaccounts and other related information including:

- **Opportunity.** For more information, see About Opportunities and Forecasts (on page 315).
- **Activity.** For more information, see Activity Fields (on page 222).
- **Service Request.** For more information, see Managing Service and Communications (on page 413).
- **Lead.**   For more information, see Leads (on page 238).

Working with the Financial Plan Homepage

The Financial Plan Homepage is the starting point for managing financial plans.

NOTE: Your company administrator can customise the layout of your Financial Plan Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Financial Plan

You can create a financial plan by clicking the New button in the Recently Modified Financial Plans section. For more information, see Creating Records (on page 51) and Financial Plan Fields (on page 769).

Working with Financial Plan Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for financial plans.

Financial Plan List	Filters
All Financial Plans	All financial plans to which you have visibility regardless of who owns the financial plan.
Recently Modified Financial Plans	All financial plans with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Financial Plans

The Recently Modified Financial Plans section shows the financial plans that you viewed most recently.

To expand the list, click Show Full List.

Adding Sections to Your Financial Plan Homepage

If your user role includes the Personalise Homepages privilege, you can add additional sections to your Financial Plan Homepage, depending on which sections your company administrator has made available for display on your Financial Plan Homepage.

The following procedure describes how to add sections to your Financial Plan Homepage.

To add sections to your Financial Plan Homepage

1   On the Financial Plan Homepage, click Edit Layout.

2   On the Financial Plan Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3   Click Save.

Managing Financial Plans

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)

- Updating Record Details (on page 103)

- Linking Records to Your Selected Record (on page 104)

- Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

- Working with the Financial Plan Homepage (on page 767)

- Financial Plan Fields (on page 769)

Financial Plan Fields

Use the Financial Plan Edit page to add a financial plan or update details for an existing financial plan. The Financial Plan Edit page shows the complete set of fields for a financial plan.

TIP: You can also edit financial plans on the Financial Plan List page and the Financial Plan Detail page. For more information on updating records, see Updating Record Details

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the Financial Plan fields.

Field	Description
Financial Plan Profile	
Financial Plan Name	The name of the financial plan.
Type	The financial plan type. Examples are: retirement, portfolio, wealth, education, and so on.
Financial Account	The financial account with which the plan is associated.
Status	The financial plan status. Examples are: In Process, Active, Approved, Under Review by Management, Under Review by Customer, and so on.
Sent to Contact	Select the check box to indicate whether this financial plan has been sent to the contact.
Approved by Contact	Select the check box to indicate whether this financial plan has been approved by the contact.
Financial Plan Summary	
External Source	The source of the external information about the financial plan, for example, an application name, database name, integration name, and so on. This field is limited to 50 characters.
External Last Updated	The date and time when the data for this financial plan was last updated (from the external source).
Integration ID	The integration ID for this financial plan.
Description	The detailed description of the financial plan. This field is limited to 16350 characters.
Additional Information	

Field	Description
Owner	The owner of the financial plan record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

Related Information

See the following topics for related, financial plan information:

- Working with the Financial Plan Homepage (on page 767)
- Managing Financial Plans (on page 768)

Financial Products

Use the Financial Products pages to create, update, and track any type of financial product.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking financial product information, the Financial Products tab might be excluded from your setup.

A *financial product* in Oracle CRM On Demand can be a specific physical good or service that a financial institution offers to its customers, or a grouping of financial products, but can also refer to any financial product from any financial institution.

Financial products can be used to track financial product types, such as loans, direct deposits (checking and savings accounts), market interest deposits (or money market accounts), time deposits (or certificates of deposits), and so on. Financial products can also be equities, derivatives, separate accounts, and hedge or mutual funds.

Using financial product records, financial institutions can view the details about financial products, including high-level product details, URL links to financial product Web sites, or catalogues. Using this feature, you can access the latest financial product details and related information about activities, opportunities, service requests, and calendars for your customers.

The financial product record type also supports financial-product hierarchies. These hierarchies allow the grouping of financial products into groups, for example, bundled offerings, mutual funds, or any other multihierarchy or multigrouping that is required.

Some examples of financial-product hierarchies are shown in the following figures.

Figure 4 shows an example of a mutual fund hierarchy.
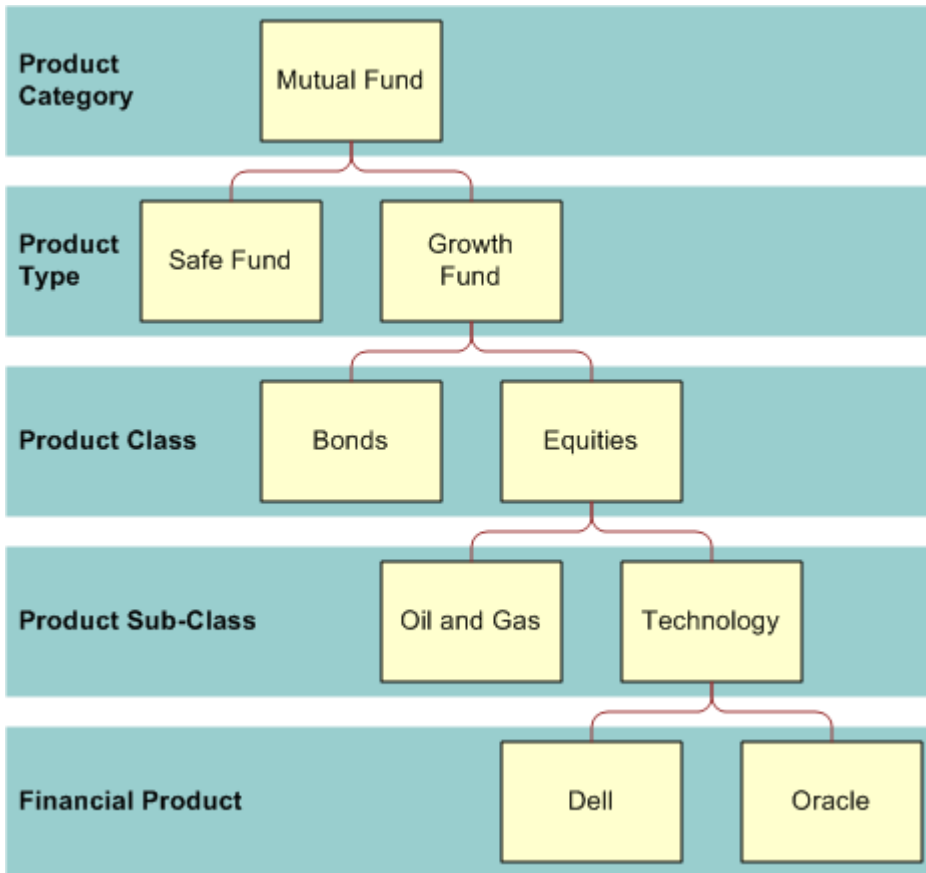
Figure 4: Mutual Fund Hierarchy Example

Figure 5 shows an example of an insurance policy hierarchy.
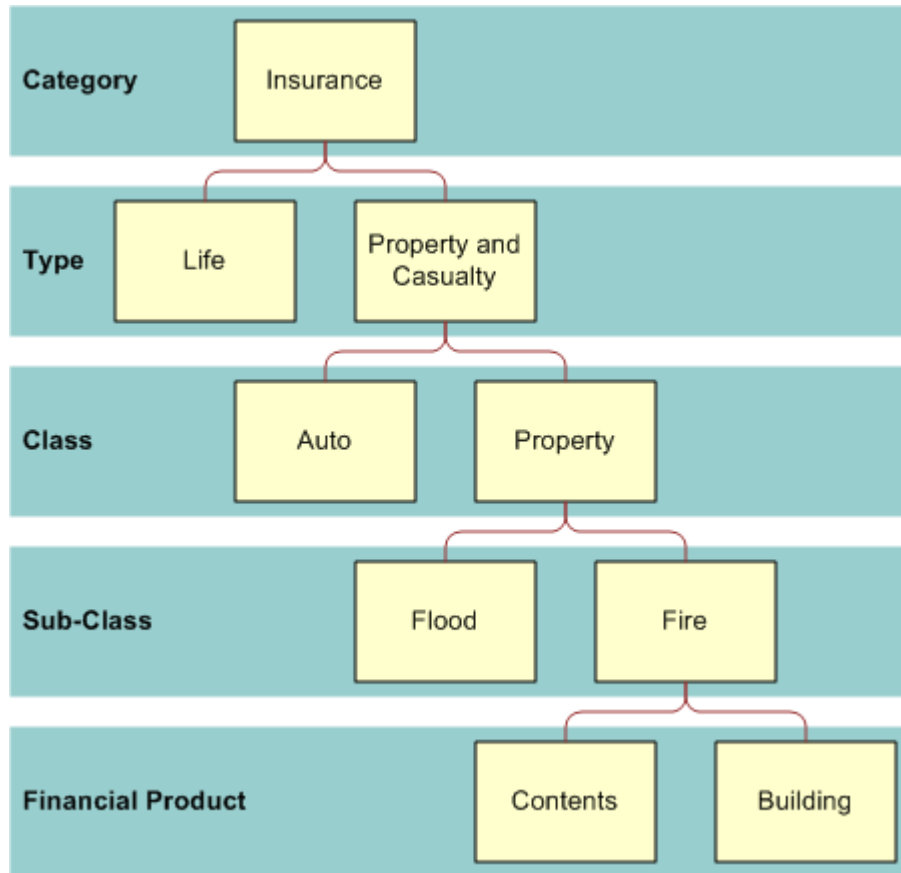
Figure 5: Insurance Policy Hierarchy Example

Working with the Financial Products Homepage

The Financial Products Homepage is the starting point for managing financial products.

NOTE: Your company administrator can customise the layout of your Financial Products Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Financial Product Record

You can create a financial product record by clicking the New button in the Recently Modified Financial Products section. For more information, see Creating Records (on page 51) and Financial Products Fields (on page 775).

TIP: You can indicate financial product hierarchies, such as an equity that is a subsidiary of a mutual fund by selecting the Parent Financial Product field. For information on financial product hierarchies, see Tracking Parent Financial Products (on page 774).

Working with Financial Product Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for financial products.

Financial Product List	Filters
All Financial Products	All financial products to which you have visibility regardless of who owns the financial products.
Recently Modified Financial Products	All financial products with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Financial Products

The Recently Modified Financial Products section shows the financial products that you viewed most recently.

To expand the list, click Show Full List.

Adding Sections to Your Financial Product Homepage

If your user role includes the Personalise Homepages privilege, you can add additional sections to your Financial Product Homepage, depending on which sections your company administrator has made available for display on your Financial Product Homepage.

The following procedure describes how to add sections to your Financial Product Homepage.

To add sections to your Financial Product Homepage

1 On the Financial Product Homepage, click Edit Layout.

2 On the Financial Product Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Managing Financial Products

To manage financial products, do the following task:

■ Tracking Parent Financial Products (on page 774)

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related financial product information:

■ Working with the Financial Plan Homepage (on page 767)

■ Financial Product Fields (see "Financial Products Fields" on page 775)

Tracking Parent Financial Products

To allow tracking of a financial product's parent-financial product, add the parent financial product to the Parent Financial Product Field on the child financial product.

To track a parent financial product

1 Select the financial product.

For more information on selecting a financial product, see Finding Records (on page 68).

2 On the Financial Product Detail page, click Edit.

3 On the Financial Product Edit page, select the Parent Financial Product field, and select a financial product.

Financial Products Fields

Use the Financial Products Edit page to add a financial product or update details for an existing financial product. The Financial Products Edit page shows the complete set of fields for a financial product.

TIP: You can also edit financial products on the Financial Products List page and the Financial Products Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the Financial Product fields.

Field	Description
Financial Product Profile	
Financial Product Name	Common name of the financial product. Examples are: Oracle Corporation, Mutual Fund X, Gold Saving, Best Mortgage, and so on.
Category	Category of financial product. (The recommended hierarchy is as follows: type, category, class, subclass, financial product, child financial product, more children, if necessary.)
Type	Type of financial product. Examples: Growth Fund, Safe Fund.
Class	Class of financial product. Examples: Equities, Bonds.
Sub-Class	Subclass of the financial product. Examples: Technology, Oil & Gas.
Parent Financial Product	Parent financial product of this product.
Financial Product ID	Financial product ID that the financial institution uses to identify a financial product in its financial product hub or equivalent entity.
MDM Product Hub ID	Financial product ID that the financial industry or external company uses to identify a financial product in an external master data management (MDM) financial product hub.
Current Price	Price of the financial product. The price can come from an external source such as market pricing, or internally, from a price list.
Price Source	Source of the price information for the financial product, for example, an application name, database name, integration name, and so on.
Current Price Last Updated	Date and time when the price for this financial product was last updated (from the price source).
Product Catalogue	
Product URL	URL for the catalogue location of this financial product. It is usually an external financial product and URL.

Field	Description
Product Overview	Summary or introduction information about the financial product. This field has a limit of 16350 characters.
Product Catalogue	URL for a financial product catalogue that contains this financial product. The URL is usually an internal financial product URL.
Financial Product Overview	
External ID	External source ID of the external information about the financial-product holder. This field has a limit of 50 characters.
External Source	Source of the external information about the financial product, for example, an application name, database name, integration name, and so on.
External Last Updated	Date and time when the data for this financial product was last updated (from the external source).

Related Topics

See the following topics for related, financial product information:

- Financial Products (on page 770)
- Working with the Financial Products Homepage (on page 772)
- Managing Financial Products (on page 774)

Financial Transactions

Use the Financial Transactions pages to create, update, and track any type of financial transaction for a specific financial account. *Financial transactions* are the individual transactions of a financial account for all financial products.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking financial transaction information, the Financial Transaction tab might be excluded from your setup.

The financial transaction records enable you to determine which financial accounts have which transactions in relation to all financial products. This information provides a complete view of financial transactions, organised by financial account. You can use financial transaction records to track all types of financial product transactions, such as a buy, sell, big ticket, redemption, deposit, withdrawal, and any other instrument defined by you within financial products.

Using financial transactions, financial institutions can deliver summary information from their middle-office or back-office applications about customer financial accounts. This information provides views that are based on clients or households. The detailed information about the financial transactions, such as quantity, prices, and important dates (such as purchase dates) is available to you within Oracle CRM On Demand when you are managing the relationship with the client.

Working with the Financial Transaction Homepage

The Financial Transaction Homepage is the starting point for managing financial transactions.

NOTE: Your company administrator can customise the layout of your Financial Transaction Homepage. In addition, if your user role includes the Personalise Homepages privilege you can add sections to the page, and remove sections from the page.

Creating a Financial Transaction

You can create a financial transaction by clicking the New button in the Recently Modified Financial Transaction section. For more information, see Creating Records (on page 51) and Financial Transaction Fields (on page 778).

Working with Financial Transaction Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for financial transactions:

Financial Transaction List	Filters
All Financial Transactions	All financial transactions to which you have visibility, regardless of who owns the financial transaction
Recently Modified Financial Transactions	All financial transactions, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Financial Transactions

The Recently Modified Financial Transactions section shows the financial transactions that were most recently modified, sorted by the modified date.

To expand the list, click Show Full List.

Adding Sections to Your Financial Transaction Homepage

If your user role includes the Personalise Homepages privilege, you might be able to add additional sections to your Financial Transaction Homepage, depending on what your company administrator has set up.

The following procedure describes how to add sections to your Financial Transaction Homepage.

To add sections to your Financial Transaction Homepage

1 On the Financial Transaction Homepage, click Edit Layout.

2 On the Financial Transaction Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Managing Financial Transactions

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Financial Transaction Fields

Use the Financial Transaction Edit page to add a financial transaction, or to update details of an existing financial transaction. The Financial Transaction Edit page shows the complete set of fields for a financial transaction.

TIP: You can also edit financial transaction information on the Financial Transaction List page and the Financial Transaction Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Financial Transaction Profile	
Financial Account	The financial account with which the financial transaction is associated.
Financial Product	The financial product with which the financial transaction is associated.

Field	Description
Transaction Type	The type of financial transaction. Some examples are: a buy, sell, big ticket, redemption, and so on.
Quantity	The number of financial product units for this financial transaction. This information usually comes from an external source.
Transaction ID	The ID of the financial transaction. This field has a limit of 50 characters.
Transaction Period	The period of the financial transaction. Some examples are: big tickets for date, month, quarter, and so on.
Transaction Price	The price of the financial product for this financial transaction. This information usually comes from an external source.
Transaction Date Time	The date and time of the financial transaction. This information usually comes from an external source.
Value	The value of the financial transaction (that is, the price multiplied by the quantity). This information usually comes from an external source.
Financial Transaction Integration	
Transaction Source	The source that your financial institution uses to identify a financial transaction in the middle-office or back-office application.
Integration ID	The integration ID of the external information about the financial transaction. This field has a limit of 50 characters.
External ID	The external source ID of the external information about the financial transaction. This field has a limit of 50 characters.
External Source	The source of the external information about the financial transaction, for example, an application name, database name, integration name, and so on. This field has a limit of 50 characters.
External Last Updated	The date and time when the data for this financial transaction was last updated (from the external source).

11 Insurance

Oracle CRM On Demand provides the following record types for insurance information:

- **Claims (on page 785).** Use these pages to manage information about insurance claims.

- **Coverage's (on page 791).** Use these pages to manage the monetary limits and risks covered by an insurance policy.

- **Damages (on page 795).** Use these pages to manage information about damage to the insured property of a contact.

- **Insurance Properties (on page 798).** Use these pages to manage information about insured property.

- **Involved Parties (on page 801).** Use these pages to manage information about contacts involved in insurance claims.

- **Policies (on page 805).** Use these pages to manage information about insurance policies.

- **Policy Holders (on page 809).** Use these pages to manage information about holders of insurance policies.

- **Broker Profile (on page 813).** Use these pages to manage information about brokers.

Note: All of these record types are available only with Oracle CRM On Demand Financial Services Edition.

Managing Insurance

To manage insurance, perform the following processes:

- Process of Performing Channel Planning (on page 782)

- Process of Producing Claims First Notice of Loss (on page 782)

- Process of Recruiting and Establishing Agent-Broker Relationships (on page 782)

- Process of Managing Agent-Broker Relationships (on page 783)

- Process of Planning Sales and Budgeting (on page 783)

- Process of Converting Insurance Leads to Clients with the Producer Success Model (on page 784)

- Process of Managing Service Requests (on page 783)

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Note: Some of these processes are performed in Oracle CRM On Demand, while others are performed outside of Oracle CRM On Demand.

Process of Performing Channel Planning

Channel planning entails developing a strategy and planning activities performed by a channel manager for the channels under his or her responsibility.

To perform channel planning, do the following tasks:

1   Create a business plan, see Business Planning (on page 385).

2   Create objectives for a business plan, see Objectives (on page 395).

3   Manage plan accounts, see Plan Accounts (on page 401).

4   Manage plan contacts, see Plan Contacts (on page 404).

5   Manage plan opportunities, see Plan Opportunities (on page 408).

Process of Producing Claims First Notice of Loss

First notice of loss involves producing customer claims reports, which include information about the claim and claimant. This report includes the coverage verification, which the call centre agent provides. The call centre agent validates the policy and coverage information.

To create a claims first notice of loss, perform the following tasks:

1   Validate the policy and coverage information provided by the claimant, see Policies (on page 805).

2   Create the claims record, see Claims (on page 785).

3   Enter information about the first notice of loss, see Claims (on page 785).

Process of Recruiting and Establishing Agent-Broker Relationships

Setting up agent-broker relationships includes the planning and execution of marketing campaigns that are targeted at potential agents, as well as setting up new agents.

To recruit new agents and set up agent-broker relationships, perform the following tasks:

1   Create a campaign record, see Creating Records (on page 51) and Campaign Fields (on page 236).

2   Associate potential agents with a campaign, see Targeting Contacts for Campaigns (on page 234).

3 Execute the marketing campaign, see Process of Handling Campaigns (on page 229).

4 Manage applications from agents and approve new agents.

5 Set up the new approved agents, see Creating Records (on page 51) and Partner Fields (on page 475).

Process of Managing Agent-Broker Relationships

Managing agent-broker relationships involves communicating with agents and monitoring agent-broker relationships, updating information about agent demographics, monitoring credentials, book maintenance, and so on.

To manage agent-broker relationships, perform the following tasks:

1 Update information about agents and agencies, see Updating Record Details (on page 103).

2 Monitor credentials for agents and agencies, see Managing Partner Accounts (on page 472).

3 Manage the business plan, see Managing Business Plans (on page 392).

4 Monitor the opportunities and service requests from agents and agencies, see Managing Opportunities (on page 320) and Managing Service Requests (on page 417).

Process of Planning Sales and Budgeting

Insurance sales-planning includes sales planning for the year, quarter, or another period. It also includes managing sales plans, for example, managing sales budgets, managing sales forecasts, and territories.

To plan sales and budgeting, perform the following tasks:

1 Perform the sales planning for the year, quarter, or another period, see Business Planning (on page 385).

2 Manage the sales budgets and quota, see Forecasts (on page 338).

3 Manage the sales forecasts, see Forecasts (on page 338).

4 Manage the territories, see Territory Management.

Process of Managing Service Requests

Managing service requests involves handling general inquiries and resolving single service requests from start to finish. It also includes evaluating service issues and prioritising requests.

To manage service requests, perform the following tasks:

1 Create the service request, see Service Requests (on page 414).

2 Assign or escalate a service request, see Assigning Service Requests (on page 418) or Escalating Service Requests (on page 420).

3 Work with solutions for a service request, see Adding Solutions to Service Requests (on page 419).

4 Close the resolved service request, see Closing Resolved Service Requests (on page 420).

Process of Converting Insurance Leads to Clients with the Producer Success Model

In Oracle CRM On Demand, you can use workflow rules to specify that one or more actions must be performed automatically each time a specified event occurs. You can configure as many workflow rules as you want to implement your business processes.

The Producer Success Model (PSM) in Oracle CRM On Demand is a framework that uses workflow rules to automate the creation of activities, allowing insurance agents or financial advisors to follow up their leads and stay in touch with their clients on a regular basis.

In the Producer Success Model, the following terms are used:

- **Producer.** A *producer* is an insurance agent or financial advisor.

- **Client.** A *client* is a contact with whom your company maintains a relationship on a long-term basis so that you can monitor changes in the client's situation and identify opportunities to cross sell additional products to the client. Clients usually also seek advice on which products fit their needs.

The Producer Success Model uses workflow rules to do the following:

- Create a task to call the lead on the next working day every time a lead record is created.

- Create a follow-up task when a producer updates the value in the Call Result field in the Task Detail page after making a call to a lead or a client.

The types of calls that producers make to leads or clients include the following:

- **Referral calls.** Calls that producers must make to follow up on leads.

- **Birthday calls.** Calls that producers make to existing leads or clients on their birthday.

- **Review calls.** Calls that producers make to leads or clients when it has been six months since the last call with the lead.

A producer can capture the result of these calls in the Call Result field on the Task Detail page. The values for the Call Result field include the following:

- **No Reach.** The lead is unreachable.

- **Stay In Touch.** The lead or contact does not want to talk today, but the lead wants the producer to stay in touch.

- **Dead File.** The lead does not want to talk today and does not want to be contacted again.

- **Appointment**. The lead or client is ready for an appointment.

Depending on the result of the calls, the workflow will create different followup tasks. For example, if the result of the call is No Reach, the workflow creates a task to call the same lead or client the next day. If the result of the call is Stay in Touch, the workflow creates a task to call the lead or client six months from now or one week prior to the birthday, whichever is sooner.

NOTE: The Producer Success Model requires the configuration of workflow rules and actions. For details, see the configuration documentation for Oracle On Demand Financial Services Edition.

To convert insurance leads to clients with the Producer Success Model, perform the following tasks:

1 Create a new lead record for the referral.

   A workflow rule automatically creates a task to call the lead on the next working day.

2 In the Activity List page, view the daily call list of referral calls and call the lead, see Working with Activity Lists (on page 192).

3 Record the call result information in the Call Result field.

   Depending on the call result, the workflow creates a followup task.

4 Schedule an appointment to meet the lead, see Scheduling Appointments with Others (on page 210).

5 Meet with the qualified lead and collect additional information.

6 Upgrade the lead to a prospect by selecting Prospect from the Lead Type picklist, see Leads Fields (on page 256).

7 Offer products to meet the prospect's needs and create an opportunity if the customer is interested, see Working with the Opportunity Homepage (on page 318).

8 Conduct a closing interview and sell the products.

9 When the customer purchases the product, upgrade the contact to a client by selecting Client from the Contact Type picklist.

10 On the Contact Detail page, set the Call Frequency field to 1-2 Times/Year. For more information on the Create Task workflow, see Creating Workflow Actions: Create Task.

Claims

Use the Claim pages to create, update, and track any type of claim. Claims are typically the claims of a contact or business that an insurance company manages.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking claims information, the Claims tab might be excluded from your setup.

A *claim* is a formal, written demand to an insurance company to reimburse the loss of, or damage to, an insured object.

Understanding a customer's claim history, including the current claim status, can help sales and service personnel become more knowledgeable about this important aspect of the insurer-customer relationship. Insurers can also use the Claim pages to record critical information quickly regarding the first notice of loss, and accurately route the claim to the appropriate personnel.

The claim record type supports all types of first-notice-of-loss claims, such as auto, property, general liability, and so on. A claim can have parent claims, so all types of claim structures and hierarchies are supported, for example, you can organise claims into claim groups.

You can use the Claim Detail page to identify and capture profile and detailed information about a claim. You can also use the Claim Detail page to review a claim's child claims and other related information including:

- Involved Parties (on page 801)
- Damages (on page 795)
- Activities

  An activity can be related to a claim. You can view all activities related to a claim on the Claim Detail page.

- Service requests

A service request can be related to a claim. You can view all service requests related to a claim on the Claim Detail page.

Working with the Claim Homepage

The Claim Homepage is the starting point for managing claims. This page contains several sections and displays information that is relevant to you.

NOTE: Your company administrator can customise the layout of your Claim Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Claim

You can create a claim by clicking the New button in the Recently Modified Claims section. For more information, see Creating Records (on page 51) and Claim Fields (on page 788).

Working with Claims Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for claims.

Claims List	Filters
All Claims	All claims to which you have visibility,

Claims List	Filters
	regardless of who owns the claim.
Recently Modified Claims	All claims, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Claims Section

The Recently Modified Claims section shows the claims that were most recently modified, sorted by the modified date. To expand the list, click the Show Full List link. The following procedure describes how to add sections to the Claims Homepage.

Adding Sections to Your Claims Homepage

If your user role includes the Personalise Homepage privilege, you can add additional sections to your Claims Homepage, depending on which sections your company administrator has made available for display on your Claims Homepage.

To add sections to your Claims Homepage

1 On the Claims Homepage, click the Edit Layout link.

2 On the Claims Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Related Information

See the following topics for related claims information:

■ Claim Fields (on page 788)

■ Managing Claims (on page 787)

Managing Claims

Click a topic to see step-by-step procedures to do the following:

- Updating Record Details (on page 103)
- Linking Records to Your Selected Record (on page 104)
- Tracking Parent Claims (on page 788)

For additional procedures that are common to all records, see Working with Records (on page 46).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names of record types, fields, and options in picklists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all the procedures described in the preceding list.

Related Information

See the following topics for related claims information:

- Working with the Claims Homepage (see "Working with the Claim Homepage" on page 786)
- Claim Fields (on page 788)

Tracking Parent Claims

To allow tracking of a parent claim, add the parent claim to the Parent Claim field on the child claim record.

To track a parent claim

1   Select the claim.

For information on selecting a claim, see Finding Records (on page 68).

2   On the Claim Detail page, click Edit.

3   On the Claim Edit page, select the Parent Claim field, and select a claim.

Claim Fields

Use the Claim Edit page to add a new claim, or to update details for an existing claim. The Claim Edit page shows the complete set of fields for a claim.

TIP: You can also edit a claim on the Claim List page and the Claim Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Claim Profile	
Claim #	The claim identifier.
Line of Business	The line of insurance business, such as auto, property, general liability, workers compensation, life.
Loss Code	The code for a particular loss, for example, insurance companies can assign 100 for auto accident, 200 for theft, and so on.
Loss Type	The type of the loss, which is related to the loss code. Examples of loss type are: auto accident, theft, and so on.
Report Date	The date when the insured person reported the claim for the accident.
Loss Date and Time	The date of the accident, or the date of the loss.
Currency	The currency for the claim.
Closed Date	The date when the claim was closed.
Event #	The number that identifies an event. Insurance companies typically categorise a catastrophic event. Some examples of event numbers are: 1002 for Hurricane Ike, 1003 for Hurricane Andrew, and so on.
Status	The status of the claim, for example, loss report, open, or reviewed, and closed.
Claim Details	
Kind of Loss	The type of loss, such as fire, theft, injury, wind, flood, hail, or other.
Category of Loss	The category of loss that most insurance companies use to categorise the loss. Some examples are: A. dwelling; B. other structures; C. personal property; D. loss of use.
Location of Loss	The location of the loss, such as in parking garage, in shopping mall, and so on.
Amount of Loss	The loss amount that the customer has incurred. If the total of a given loss exceeds the liability amount, the customer might have to pay the rest.
Liability Source	The source of the liability that caused this claim. Some examples are: injured employee, property of employee damaged, injured private person, property of private person, slip and fall, or vehicular injury.
Amount of Liability	The amount that must be paid if there is a loss.
Relationship to Insured	The relationship of the injured to the insured. Some examples are: employer, supervisor, or colleague.
Place of Injury	The location where the injury occurred.

Field	Description
Date Employer Aware of Injury	The date the employer became aware of an employee injury.
Date Employer Aware of Claim	The date when the employer became aware of an employee claim.
# of People Injured	The number of people injured in the accident. Some of these people might be employees, and some might not.
# of Employee Injured	The number of employees injured in the accident.
Part of Body Injured	The part of the body that is injured, such as hand, leg, neck, and so on.
Type of Injury	The injury type, such as burn, fracture, sprain, repetitive stress.
Medical Injury Code	The code for a particular medical injury, such as IDC-9, IDC-10.
Ability to Work	Indicates whether the employee can still work because of this injury.
Class of Employee	An employee class, such as secretary, manager, and so on.
Injured During Working Hours ?	Indicates whether the injury occurred during working hours or not.
Hospital Name	The name of the hospital that treated the claimant's injury.
Time of Death	The time when the injured person died.
Police/ Coroner Report #	The report number of the police or coroner's report related to a worker's compensation claim.
Claim Integration	
External System Id	Tracks the external source ID of the external information for this claim. This field has a limit of 50 characters.
External Source	The source of the external information about the claim, for example, an application name, database name, integration name, and so on.
External Last Update	Tracks the date and time of the last external update of data of this claim. The date and time when the data for this policy was last updated (from the external source).
Claim Policy	
Policy	The insurance policy that is linked to this claim.
Reported By	The designation of the person who reported the accident. Some examples are: named insured, driver of insured vehicle, or agent.
Reporter Contact Info	The contact information of the person reporting the accident.
Conditions	The conditions when the accident occurred, such as weather conditions, for

Field	Description
	example, *It was raining that day.*
At Fault	Identifies who is at fault. Some examples are: insured driver and other driver.
Police/Fire Department	The police or fire station where the report was written.
Report #	The report number that is related to the accident.
Comments	The detailed description of the claim.
Loss Description	The description of the loss, for example, car hit by a truck.
Business Account	The business account that is linked to this claim.
Address	The address where the claim occurred. The address might be different from any other address in Oracle CRM On Demand, and is not related to a contact or business address, or a property address. This address is required and is relevant and appropriate only for this claim record.
City	The city where the claim occurred. The city might be different from any other city in Oracle CRM On Demand, and might not be related to a contact or business city record, or property city. The city name is required and is relevant and appropriate only for this claim record.
State	The state (in jurisdictions such as the United States that use states) or province (in jurisdictions such as Canada that use provinces) where the claim occurred. For example, CA for California, or ON for Ontario.
ZIP/Postal Code	The ZIP code (in the United States) or the postal code (in other jurisdictions) of the location of the accident.

Related Information

See the following topics for related claims information:

■ Working with the Claims Homepage (see "Working with the Claim Homepage" on page 786)

■ Managing Claims (on page 787)

Coverage's

Use the Coverage pages to create, update, and track any type of insurance coverage. Coverage's are typically the monetary limits and risks covered in an insurance policy for a contact.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking coverage information, the Coverage tab might be excluded from your setup.

Coverage is the monetary limits and risks that are covered in an insurance policy. To track coverage's for the policies, you add them as coverage's to the policy. You can use coverage to track all types of coverage, such as a collision, bodily injury, fire, and so on. You can use the Coverage pages to identify and profile coverage's

by capturing coverage information, such as the type of coverage, the individual limit, the total limit, deductible values, and so on.

Working with the Coverage Homepage

The Coverage Homepage is the starting point for managing coverage records.

NOTE: Your company administrator can customise the layout of your Coverage Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Coverage Record

You can create a coverage record by clicking the New button in the Recently Modified Coverage's section. For more information, see Creating Records (on page 51) and Coverage Fields (on page 794).

Working with Coverage Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for coverage's.

Coverage List	Filters
All Coverage's	All coverage's to which you have visibility, regardless of who owns the coverage.
Recently Modified Coverage's	All coverage's with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Coverage's

The Recently Modified Coverage's section shows the coverage's you viewed most recently.

To expand the list, click Show Full List.

Adding Sections to Your Coverage Homepage

If your user role includes the Personalise Homepages privilege, you can add additional sections to your Coverage Homepage, depending on which sections your company administrator has made available for display on your Coverage Homepage.

To add sections to your Coverage Homepage

1 On the Coverage Homepage, click the Edit Layout link.

2 On the Coverage Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Related Information

See the following topics for related coverage information:

■ Coverage Fields (on page 794)

■ Managing Coverage's (on page 793)

Managing Coverage's

Click a topic to see step-by-step procedures to do the following:

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

For additional procedures that are common to all records, see Working with Records (on page 46).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names of record types, fields, and options in picklists. Therefore, the information that you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related coverage information:

■ Working with the Coverage Homepage (on page 792)

■ Coverage Fields (on page 794)

Coverage Fields

Use the Coverage Edit page to add a coverage record, or to update details for an existing coverage record. The Coverage Edit page shows the complete set of fields for a coverage record.

TIP: You can also edit a coverage record on the Coverage List page and the Coverage Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Coverage Profile	
Coverage Name	The unique name of the coverage.
Policy	The policy linked to this coverage.
Coverage	The type of coverage that the customer purchased in the policy to cover his or her liability. Some examples of coverage are: collision, comprehensive, bodily injury, medical payment.
Coverage Status	The status of the coverage, such as Pending, Open, and Closed.
Currency	The currency of the coverage.
Insured Property	The insurance property linked to the coverage record.
Individual Limit	The limit for an individual coverage. For example, the maximum amount that can be paid for a collision coverage might be $100,000.
Total Limit	The total limit that can be paid out. For example, if the insured is involved in a collision between two cars, the total limit that might be paid out under the collision coverage for both cars could be limited to $300,000.
Coverage Product	The insurance product associated with this coverage.
Coverage Detail	
Deductible	The amount that the customer must pay first before the insurance company pays. (The term *deductible* is also known as *excess* in some countries, such as the United Kingdom and Ireland.)
Begin	The date from which the coverage is in effect.
End	The date that the coverage ends.
Insured Amount	The amount that is insured.
Coverage Integration	
External System Id	Tracks the external source ID of the external information about the coverage. This field has a limit of 50 characters.

Field	Description
External Source	The source of the external information about the policy, for example, an application name, database name, integration name, and so on.
Integration ID	Tracks the integration ID of the external information about the coverage record. This field has a limit of 50 characters.
External Last Update	The date and time when the data for this policy was last updated (from the external source).

Related Information

See the following topics for related coverage information:

- Working with the Coverage Homepage (on page 792)
- Managing Coverages (see "Managing Coverage's" on page 793)

Damages

Use the Damage pages to identify and capture damage information, such as damage description and damage amount. *Damage* is impairment to property resulting in a loss of value. Damage is used in insurance claims to track the damage to property covered in a policy.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking damages information, the Damage tab might be excluded from your setup.

Working with the Damage Homepage

The Damage Homepage is the starting point for managing damages.

NOTE: Your company administrator can customise the layout of your Damage Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Damage Record

You can create a damage record by clicking the New button in the Recently Modified Damages section. For more information, see Creating Records (on page 51) and Damage Fields (on page 797).

Working with Damage Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for damages.

Damage List	Filters
All Damages	All damages to which you have visibility, regardless of who owns the damage record.
Recently Modified Damages	All damages, sorted by the modified date.

To view a list, click on the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Damages

The Recently Modified Damages section shows the damage records that were modified most recently.

To expand the list, click Show Full List.

Adding Sections to Your Damage Homepage

If your user role includes the Personalise Homepages privilege, you might be able to add additional sections to your Damage Homepage, depending on what your company administrator has made available for display on your Damage Homepage.

The following procedure describes how to add sections to your Damage Homepage.

To add sections to your Damage Homepage

1 On the Damage Homepage, click Edit Layout.

2 On the Damage Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Related Topics

See the following topics for related damages information:

■ Damage Fields (on page 797)

■ Managing Damages (on page 797)

Managing Damages

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related damage information:

■ Working with the Damage Homepage (on page 795)

■ Damage Fields (on page 797)

Damage Fields

Use the Damage Edit page to add a damage record, or update the details for an existing damage record. The Damage Edit page shows the complete set of fields for a damage record.

TIP: You can also edit damage records on the Damage List page and the Damage Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Damage Profile	
Claim	The claim linked to the damage record.
Insurance Property	The insured property linked to the damage record.
Damage Name	The unique name of the damage. This field has a limit of 50 characters.
Damaged Property Description	The description of the damaged property, for example, car BMW. This field has a limit of 16,350 characters.

Field	Description
Damage Description	The description of the damage, for example, *front-right light is damaged.* This field has a limit of 16,350 characters.
Currency	The currency for the damage.
Property #	The number of the property, for example, property 1, property 2, and so on. For example, if a policy has three cars, you can number the cars as follows: 1 is Toyota Corolla, 2 is Mazda Miata, and 3 is Hyundai Pony.
Damaged Property Type	The type of property, such as motorcycle, motor home, private passenger, house, and so on.
Estimate Amount	An estimate of the amount of damage on the insured property.
Damage Integration	
External System Id	Tracks the external source ID of the external information about the damage record. This field has a limit of 50 characters.
External Source	The source of the external information about the policy, for example, an application name, database name, integration name, and so on.
Integration ID	Tracks the integration ID of the external information about the damage record. This field has a limit of 50 characters.
External Last Updated	The date and time when the data for this policy was last updated (from the external source).

Related Topics

See the following topics for related damage information:

- Working with the Damage Homepage (on page 795)
- Managing Damages (on page 797)

Insurance Properties

Use the Insurance Properties pages to create, update, and track insurance properties accounts. An insurance properties record allows contacts to be grouped together and their related information to be rolled up from the contacts who are linked to the insurance property.

An *insurance property* is a tangible asset to which a contact or business owner has a legal title. The owner purchases the insurance policy to protect the physical property against loss from theft, fire, and other perils. This term (insurance property) is also used in a claim. The owner can specify which insurance property is damaged in an incident.   You can use an insurance property record to track all types of insured property, such as a car, a boat, jewellery, a house, and so on.

You can use the Insurance Property pages to identify and profile insurance property by capturing information such as make, model, construction year, license number, and so on. You can also use the Insurance Property

pages to review other related information. For more information, see Coverage's (on page 791) and Damages (on page 795).

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking insurance property information, the Insurance Properties tab might be excluded from your setup.

Working with the Insurance Property Homepage

The Insurance Property Homepage is the starting point for managing insurance property records.

NOTE: Your company administrator can customise the layout of your Insurance Property Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating an Insurance Property Record

You can create an insurance property record by clicking the New button in the Recently Modified Insurance Properties section. For more information, see Creating Records (on page 51) and Insurance Properties Fields (on page 801).

Working with Insurance Property Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists that are available for insurance properties.

Insurance Property List	Filters
All Insurance Properties	All insurance properties to which you have visibility
Recently Modified Insurance Properties	All insurance properties with your name in the Owner field, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Insurance Properties Section

The Recently Modified Insurance Properties section shows the insurance properties that you viewed most recently.

To expand the list, click Show Full List.

Adding Sections to Your Insurance Property Homepage

If your user role includes the Personalise Homepages privilege, you can add additional sections to your Insurance Property Homepage, depending on which sections your company administrator has made available for display on your Insurance Property Homepage.

The following procedure describes how to add sections to your Insurance Property Homepage.

To add sections to your Insurance Property Homepage

1   On the Insurance Property Homepage, click Edit Layout.

2   On the Insurance Property Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3   Click Save.

Managing Insurance Properties

For step-by-step procedures that are common to many record types, see:

■   Creating Records (on page 51)

■   Updating Record Details (on page 103)

■   Linking Records to Your Selected Record (on page 104)

■   Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Insurance Properties Fields

Use the Insurance Property Edit page to add an insurance property record or update the details of an existing insurance property. The Insurance Property Edit page shows the complete set of fields for an insurance property.

TIP: You can also edit an insurance property on the Insurance Property List page and the Insurance Property Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Property Profile	
Policy	The policy linked to the insurance property.
Sequence	The sequence number for the insurance property. For example, you might have three cars for a policy, sequence number 1 might be for Toyota Corolla, 2 for Mazda Miata, and 3 for a Hyundai car.
Type	The type of the insurance property, such as a motorcycle, a motor home, a private passenger car, a family home, and so on.
Description	A detailed description of the insurance property. This field has a limit of 16,350 characters.
Amount	The amount insured for the insurance property.
Currency	The currency for the insurance property.
Property Integration	
External ID	Tracks the external source ID of the external information about the claim. This field has a limit of 50 characters.
External Source	The source of the external information about the insurance property, for example, an application name, database name, integration name, and so on.
Integration ID	Tracks the integration ID of the external system. This field has a limit of 50 characters.

Involved Parties

Use the Involved Party pages to create, update, and track any type of involved party. The involved party tracks the relationship between contacts and claims.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking involved party information, the Involved Parties tab might be excluded from your setup.

An *involved party* is a contact involved in an insurance claim. Each contact might have a role in a claim. You can use the Involved Parties tab to track the contact's relationship with the claims. Some examples of the role of contacts in a claim are: claimant, insured driver, and lawyer. You can use the Involved Party pages to identify and profile an involved party.

Working with the Involved Party Homepage

The Involved Party Homepage is the starting point for managing involved parties.

NOTE: Your company administrator can customise the layout of your Involved Party Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating an Involved Party Record

You can create an involved party record by clicking the New button in the Recently Modified Involved Parties section. For more information, see Creating Records (on page 51) and Involved Party Fields (on page 803).

Working with Involved Party Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists.

Involved Party List	Filters
All Involved Parties	All involved parties to which you have visibility, regardless of who owns the involved party.
Recently Modified Involved Parties	All involved parties with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Involved Parties

The Recently Modified Involved Parties section shows the involved parties whom you modified most recently.

To expand the list, click Show Full List.

Adding Sections to Your Involved Party Homepage

If your user role includes the Personalise Homepages privilege, you can add additional sections to your Involved Party Homepage, depending on which sections your company administrator has made available for display on your Involved Party Homepage.

The following procedure describes how to add sections to your Involved Party Homepage.

To add sections to your Involved Party Homepage

1 On the Involved Party Homepage, click Edit Layout.

2 On the Involved Party Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Managing Involved Parties

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Involved Party Fields

Use the Involved Party Edit page to add an involved party, or update the details of an existing involved party. The Involved Party Edit page shows the complete set of fields for an involved party.

TIP: You can also edit an involved party on the Involved Party List page and the Involved Party Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the Involved Party fields.

Field	Description
Involved Party Profile	
Claim	The claim linked to this involved party.
Contact	Contact name for the claim.
Involved Party Name	The unique name of the involved party.
Role	The role of the contact in the claims. Some examples are: adverse claimant, claimant, witness, lawyer, and insured spouse.
Currency	The currency for the involved party.
Role in Accident	The role of the involved party in the accident. Some examples are: driver, passenger, and pedestrian.
Location	The location of the claimant when the accident happened. Some examples are: in involved vehicle, in uninvolved vehicle, and pedestrian.
Involved Party Details	
Injury Summary	The summary of the injury to the involved party. This field has a limit of 250 characters.
Injury Description	The detailed description of the injury to the involved party. This field has a limit of 16,350 characters.
Involved Party Integration	
External System ID	Tracks the external source ID of the external information about the involved party. This field has a limit of 50 characters.
External Source	The source of the external information about the involved party, for example, an application name, database name, integration name, and so on.
Integration ID	Tracks the integration ID of the external information about the involved party.
External Last Update	The date and time at which the data for this involved party was last updated (from the external source).

Policies

Use the Policy pages to create, update, and track any type of insurance policy. Policies are generally the policies of a contact or business that the insurance company manages, but can also track all policies of a contact or business, including those at other insurance companies.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking policy information, the Policy tab might be excluded from your setup.

A *policy* is a written agreement between the insurer and the policy holder, in which the insurer commits to providing the insurance benefit on the occurrence of an insurable event, and in which the policyholder commits to paying the premium. Policies provide a structure for insurers to manage both contact and business relationships.

The policy record type enables insurers to move from policy-centric relationships to client and household-centric relationships by having access to high-level policy information. The policy information (for example, type, status, and effective date within Oracle CRM On Demand) supports engagements of client-household centric relationships, such as activities, claims, and calendar. You can use the policy record type to track all types of policies, such as auto, property, general liability, and other types of policies. A policy can have parent policies, thus all types of policy structures and hierarchies are supported. These policy hierarchies support the grouping of policies into policy groups, providing the flexibility to enable any policy structure that is required.

Profile and Related Information About Policies

You can use the Policy pages to identify and capture profile and detailed information about a policy. You can also use the Policy pages to review a policy's child policies and other related information including:

- Policy Holders (on page 809)
- Claims (on page 785)
- Insurance Properties (on page 798)
- Coverages (see "Coverage's" on page 791)
- **Activities.** An activity can be related to a policy. On the Policy Homepage you can display activities related to a policy. For more information, see Working with the Policy Homepage (on page 805).
- **Service requests.** A service request can be related to a policy. On the Policy Homepage, you can display service requests related to a policy. For more information about service requests, see Service Requests (on page 414).

Working with the Policy Homepage

The Policy Homepage is the starting point for managing policies.

NOTE: Your company administrator can customise the layout of your Policy Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Policy

You can create a policy by clicking the New button in the Recently Modified Policy section. For more information, see Creating Records (on page 51) and Policy Fields (on page 807).

Working with Policy Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for policies.

Policy List	Filters
All Policies	All policies to which you have visibility, regardless of who owns the record
Recently Modified Policies	All policies with your name in the Owner field, sorted by the modified date.
My Policies	Policies with your name in the Owner field.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Policies

The Recently Modified Policies section shows the policies that were modified most recently.

To expand the list, click Show Full List.

Adding Sections to Your Policy Homepage

If your user role includes the Personalise Homepages privilege, you can add additional sections to your Policy Homepage, depending on which sections your company administrator has made available for display on your Policy Homepage.

The following procedure describes how to add sections to your Policy Homepage.

To add sections to your Policy Homepage

1   On the Policy Homepage, click Edit Layout.

2   On the Policy Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Managing Policies

To manage policies, do the following task: Tracking Parent Policies (on page 807).

For step-by-step procedures that are common to many record types, see:

◼ Creating Records (on page 51)

◼ Updating Record Details (on page 103)

◼ Linking Records to Your Selected Record (on page 104)

◼ Working with Lists (on page 112)

◼ Working with Attachments (on page 147)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Tracking Parent Policies

To allow tracking of a policy's parent policy, add the parent policy to the Parent Policy Field on the child policy.

To track a parent policy

1 Select a policy.

For information on selecting a policy, see Finding Records (on page 68).

2 On the Policy Detail page, click Edit.

3 On the Policy Edit page, select the Parent Policy field, and select a policy.

Policy Fields

Use the Policy Edit page to add a policy or update the details of an existing policy. The Policy Edit page shows the complete set of fields for a policy.

You can also edit a policy record on the Policy List page and the Policy Detail page. For more information on updating records, see Updating Record Details (on page 103).

TIP: You can indicate policy hierarchies, in which a policy is a child of another policy, by selecting a parent policy within a policy record. For information on tracking parent policies, see Tracking Parent Policies (on page 807).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the policy fields.

Field	Description
Policy Profile	
Policy #	The policy number that is usually generated by the policy system.
Policy Type	The type of the policy, such as auto, property, general liability, workers compensation, or life.
Status	The policy status, such as new business, in force, pending, terminated, renewal, or quote.
Sub Status	The policy substatus, such as not submitted, broker review, cancelled, or expired.
Currency	The currency for the policy.
Effective Date	The date from which the policy is effective.
Expiration Date	The date when the policy expired.
Cancelled Date	The date when the policy was cancelled.
Rate State	The rate that can be applied to a policy in a particular state.
Rate Plan	The rate plan for this policy. Each insurance company might have different rate tiers for a policy. Some example values are: 01, 02, 03, and so on.
Owner	The owner of the policy record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Policy Integration	
External System ID	Tracks the external source ID of the external information about the policy. This field has a limit of 50 characters.

Field	Description
External Source	The source of the external information about the policy, for example, an application name, database name, integration name, and so on.
Integration ID	Tracks the integration ID of the external information about the policy. This field has a limit of 50 characters.
External Last Updated	The date and time at which the data for this policy was last updated from the external source.
Policy Agent	
Primary Agency	The primary agency that initiated the policy.
Primary Agent	The primary agent who handles this policy.
Referral Source	The referral source, such as the Internet, direct mail, magazine ad, and client referral.
Producer Code	The code for the producer who brought this policy to the insurer.
Face Amount	The amount stated on the insurance policy to be paid upon death or maturity.
Total Premium	The total premium for this policy.
Billing Status	The status of the policy billing, such as billed, lapsed, or paid.
Invoice Due Date	The date the policy invoice is due.
Term	The term of the policy, for example, 1 year, 2 year, and so on.
Policy Pay Method	The method that the customer uses to pay for the policy, such as cash, charged, check, or electronic fund transfer.

Policy Holders

Use the Policy Holder pages to create, update, and track any type of policy holder. A *policy holder* is typically the contact who owns the policy that the insurance company manages.

A policy holder record is used to track the relationship between contacts and policies. It captures all types of roles that the contact can have in a policy. Example roles are: insured, primary driver, beneficiary, and so on. You can create other roles, as needed. For information about setting up fields and field values, see Creating and Editing Fields.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking policy holder information, the Policy Holders tab might be excluded from your setup.

Working with the Policy Holder Homepage

The Policy Holder Homepage is the starting point for managing policy holders.

NOTE: Your company administrator can customise the layout of your Policy Holder Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Policy Holder

You can create a policy holder by clicking the New button in the Recently Modified Policy Holders section. For more information, see Creating Records (on page 51) and Policy Holder Fields (on page 812).

Working with Policy Holder Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for policy holders.

Policy Holder List	Filters
All Policy Holders	All policy holders to which you have visibility, regardless of who owns the policy holder
Recently Modified Policy Holders	All policy holders, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Policy Holders

The Recently Modified Policy Holders section shows the policy holders that were modified most recently.

To expand the list, click Show Full List.

Adding Sections to Your Policy Holder Homepage

If your user role includes the Personalise Homepages privilege, you can add additional sections to your Policy Holder Homepage, depending on which sections your company administrator has made available for display on your Policy Holder Homepage.

The following procedure describes how to add sections to your Policy Holder Homepage.

To add sections to your Policy Holder Homepage

1   On the Policy Holder Homepage, click Edit Layout.

2   On the Policy Holder Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3   Click Save.

Related Topics

See the following topics for related information:

■ Managing Policy Holders (on page 811)

■ Policy Holder Fields (on page 812)

Managing Policy Holders

For step-by-step procedures that are common to many record types, see:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

■ Working with the Policy Holder Homepage (on page 810)

■ Policy Holder Fields (on page 812)

Policy Holder Fields

Use the Policy Holder Edit page to add a policy holder, or to update details of an existing policy holder. The Policy Holder Edit page shows the complete set of fields for a policy holder.

TIP: You can also edit policy holder information on the Policy Holder List page and the Policy Holder Detail page. For more information on updating records, see Updating Record Details (on page 103).

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Policy Holder Profile	
Policy	The policy linked to this policy holder.
Contact Holder	The contact name for the policy.
Policy Holder Name	The unique name of the policy holder.
Role	The role of the contact in this policy. Some example roles are: insured, primary driver, and beneficiary.
Currency	The currency of the policy holder.
Insured Type	The insured type for each contact in the policy, such as primary, or secondary.
Percentage	The percentage of the policy that the holder owns. For example, for a life policy, customers can receive the proceeds of the policy, based on this percentage.
Policy Holder Integration	
External System ID	The external source ID of the external information about the policy holder. This field has a limit of 50 characters.
External Source	The source of the external information about the policy holder, for example, an application name, database name, integration name, and so on. This field has a limit of 50 characters.
Integration ID	The integration ID of the external information about the policy holder. This field has a limit of 50 characters.
External Last Updated	The date and time when the data for this policy holder was last updated (from the external source).

Related Topics

See the following topic for related information:

■ Working with the Policy Holder Homepage (on page 810)

Broker Profile

The Broker Profile tab represents any insurance broker who sells or services insurance products. Every year, the channel manager usually meets with each broker and creates a new broker profile for the year. The broker profile captures demographic information about a broker for a particular year.

The Broker Profile pages in Oracle CRM On Demand enable you to capture demographic information about the partner, such as the broker name, address, phone numbers, fax number, Web site, revenue, description of business, and so on. The broker profile is a child of the partner.   For more information about partners, see Partners (on page 470).

Working with the Broker Profiles Homepage

The Broker Profile Homepage is the starting point for managing broker profiles.

NOTE: Your company administrator can customise the layout of your Broker Profile Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Broker Profile

You can create a broker profile by clicking the New button in the Recently Modified Broker Profile section. For more information, see Creating Records (on page 51) and Broker Profile Fields (on page 815).

Working with Broker Profiles Lists

The Broker Profiles Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for broker profiles.

Broker Profile List	Description
All Broker Profiles	Displays all records to which you have visibility, regardless of who owns the list. It does not filter broker profiles.
Recently Modified Broker Profiles	Filters all broker profiles, sorted by the modified date.
All National Broker Profiles	Filters all broker profiles where Sub Channel is set to National.
My Broker Profiles	Filters broker profiles with your name in the Owner field.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, therefore you cannot edit or delete them.

Viewing My Recently Modified Broker Profiles Section

The My Recently Modified Broker Profiles section shows the broker profile requests that you own and were recently modified. To expand the list, click Show Full List.

Adding Sections to Your Broker Profiles Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Broker Profiles Homepage:

- Broker Profiles Lists
- My Recently Modified Broker Profiles
- My Broker Profiles
- All National Broker Profiles.

To add sections to the Broker Profiles Homepage

1 On the Broker Profiles Homepage, click Edit Layout.

2 On the Broker Profiles Homepage Layout page, click the arrows to add or remove sections and to organise the sections on the page. Then click Save.

Managing Broker Profiles

For additional procedures that are common to all records, see Working with Records (on page 46).

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 103)
- Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

Broker Profile Fields

Use the Broker Profile Edit page to add a broker profile or update details for an existing broker profile. The Broker Profile Edit page shows the complete set of fields for a broker profile.

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names of record types, fields, and options in lists. So, the information you see might differ from the standard information, described in this table.

The following table provides additional information regarding some fields.

Field	Description
Demographic Information	
Broker Profile Name	The name of the broker profile. To avoid duplicate records, make sure that you follow the naming conventions that your company has set up for abbreviations, capitalisation, and so on.
Partner	The name of the broker who has this profile.
Sub Channel	The description of the broker coverage. The options include: Globals, Locals, Nationals, Regionals, and Wholesalers.
Segmentation	The description of the broker segmentation. The options include: Commercial, Growth, and Retail.
Broker Profile Year	The year during which a broker profile is valid.
Phone Number	The phone number of the broker.
Fax Number	The fax number for the broker.
Website	The URL address for the broker.

Field	Description
Country	The country in which the broker is based.
Address 1	The address of the broker location.
Address 2	The address of the broker location.
City	The city in which the broker is based.
Province	The state (in jurisdictions such as the United States that use states) or province (in jurisdictions such as Canada that use provinces) where the broker is located, for example, *CA* for California, or *ON* for Ontario.
Post Code	The ZIP code (in the United States) or the postal code (in other jurisdictions) of the location of the broker.
Miscellaneous	
Company Overview	Overview of the broker.
Company Historic and Future Growth	The description of the broker history and future growth.
Territory/Regional Structure	The description of the broker territory and regional structure.

12 **Automotive**

Oracle CRM On Demand provides the following record types that provide automotive information:

■ **Vehicles.** Use these pages to track the sales history and service history of vehicles.

■ **Dealers.** Use these pages to manage dealer information.

Note: These record types are available only with Oracle CRM On Demand Automotive Edition.

Dealers

Use the Dealers home pages to create, update, and track dealer records.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking dealer information, the Dealer tab might be excluded from your setup.

Working with the Dealer Homepage

The Dealer Homepage is the starting point for managing dealers.

NOTE: Your company administrator can customise the layout of your Dealer Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Dealer

You can create a dealer by clicking the New button in the My Recently Viewed Dealers section. For more information, see Creating Records (on page 51) and Dealer Fields (on page 820).

Working with Dealer Lists

The Dealer Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for dealers.

Dealer List	Filters

Dealer List	Filters
All Dealers	All dealers to which you have visibility regardless of who owns the dealer.
My Dealers	Dealers with your name in the Owner field.
Recently Modified Dealers	All dealers with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Dealers

The My Recently Viewed Dealers section shows the dealers that you viewed most recently.

To expand the list, click Show Full List.

Viewing Dealer-Related Opportunities

The Dealer-Related Opportunities section shows the top opportunities that are assigned to you.

To expand the list of dealer-related opportunities, click Show Full List.

Adding Sections to Your Dealer Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Dealer Homepage:

- Recently Created Dealers
- Recently Modified Dealers
- My Recently Created Dealers
- My Recently Modified Dealers
- One or more report sections (your company administrator can make report sections available for display on your Dealer Homepage)

To add sections to your Dealer Homepage

1   On the Dealer Homepage, click Edit Layout.

2   On the Dealer Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Related Information

See the following topics for related dealer information:

■ Dealer Fields (on page 820)

■ Managing Dealers (on page 819)

Managing Dealers

To manage dealers, do the following tasks:

■ Creating Records (on page 51)

■ Updating Record Details (on page 103)

■ Linking Records to Your Selected Record (on page 104)

■ Working with Lists (on page 112)

■ Transferring Ownership of Records (on page 133)

■ Adding Notes (on page 143)

■ Attaching Files and URLs to Records (on page 150)

■ Deleting and Restoring Records (on page 161)

■ Managing Calendars and Activities (on page 185)

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related dealer information:

■ Dealers (on page 817)

■ Dealer Fields (on page 820)

■ Working with the Dealer Homepage (on page 817)

■ Reports (on page 907)

Dealer Fields

Use the Dealer Edit page to add a dealer or update details for an existing dealer. The Dealer Edit page shows the complete set of fields for a dealer.

NOTE: Company administrators can customise your application in a variety of ways, such as changing names for record types, fields and options in picklists. Therefore, the information that you see might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Dealer Information	
Name	Name of the automobile dealer. Limit of 100 characters.
Phone number	The dealer's phone number.
Dealer Type	The dealer type, for example, Truck Dealer. Limit of 20 characters.
Site	The dealer{\f2 '}s Website. Limit of 50 characters.
E-mail	The dealer's contact email address. Limit of 50 characters.
NOTE: The following Billing and Shipping address fields are not available by default. Your company administrator must set them up on the Dealer Detail page as part of an additional section. For more information on setting up Detail pages, see Customising Static Page Layouts.	
Billing Address 1, 2, 3	The dealer's billing address. **NOTE:** If shared addresses are set up for your company, the billing address is read-only, and the address fields change to meet the requirements for shared addresses. For more information on shared addresses, see Addresses.
Billing City	None.
Billing Country	The country specified in the dealer's billing address. The default valid values are the names of all the countries in the world. The valid value for the U.S. is *USA*. Oracle CRM On Demand does not allow you to modify the valid values for this field. Make sure the import data matches the valid values for this field before importing any data. For more information, see About Countries and Address Mapping.
Invoicing PO Box/Sorting Code	If your file contains non-U.S. addresses, then map the following address items to this field: Colonial/Section, CEDEX Code, Address 4, URB, and Township. For more information, see About Countries and Address Mapping.
Billing Province	If your file contains non-U.S. addresses, then map the following address items or their equivalents for the U.S. state to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast. For more information, see About Countries and Address Mapping.

Dealers

Field	Description
Billing US State	The default valid values are standard two-letter abbreviations for all the U.S. states, which take all capital letters. Oracle CRM On Demand does not allow you to modify the valid values for this field. Make sure the import data matches the valid values for this field before importing any data.
Invoicing Zip Code	None.
Shipping Address 1, 2, 3	The dealer's shipping address. For information on how to map address fields on a country-by-country basis, see About Countries and Address Mapping. **NOTE:** If shared addresses are set up for your company, the shipping address is read-only, and the address fields change to meet the requirements for shared addresses. For more information on shared addresses, see Addresses.
Shipping City	None.
Shipping Country	The default valid values are the names of all the countries in the world. The valid value for the U.S. is *USA*. Oracle CRM On Demand does not allow you to modify the valid values for this field. Make sure the import data matches the valid values for this field before importing any data. For more information, see About Countries and Address Mapping.
Shipping PO Box/Sorting Code	If your file contains non-U.S. addresses, then map the following address items to this field: Colonial/Section, CEDEX Code, Address 4, URB, and Township. For more information, see About Countries and Address Mapping.
Shipping Province	If your file contains non-U.S. addresses, then map the following address items or their equivalents for the U.S. state to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast. For more information, see About Countries and Address Mapping.
Shipping US State	The default valid values are standard two-letter abbreviations for all the U.S. states, which take all capital letters. Oracle CRM On Demand does not allow you to modify the valid values for this field. Make sure the import data matches the valid values for this field before importing any data.
Shipping Zip/Post Code	None.

Additional Information

Status	The status of the dealer, for example, Active.
Parent Dealer	The parent dealer of the current dealer record.
Currency	The currency of issue.
Ranking	The ranking of a dealer relative to other dealers, typically for sales or service purposes. Limit of 22 characters.

Field	Description
Owner	The owner of the dealer record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. The value in the Owner field affects which records are included in reports that you or your managers run from Reports and Dashboard pages. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
URL	The dealer{\f2 '}s Universal Resource Locator (URL). Limit of 100 characters.
Parent Site	Parent dealer's Web site. Limit of 50 characters.
Stage	The phase of the application and contracting process for the dealer. Default values are: Active, Application Pending, Candidate and Contract Pending.

Custom Fields

NOTE: Company administrators, whose role includes the Customise Application privilege, typically create custom fields.

Any custom field that is created in an Account record appears as the same custom field in the Dealer record, because a Dealer record inherits a custom field in an Account record. However, any custom field that is created in a Dealer record does not automatically appear in the Account record.

If you want to see the same custom field in both the Account view and the Dealer view, your company administrator can create the custom field in the Account record, and make it visible to both the Account view and the Dealer view.

If you do not want to see the same custom field in both the Account view and the Dealer view, your company administrator can create the Account-specific custom field in the Account record, and make the custom field visible in the Account view only.

For more information on custom fields, see About Custom Fields.

Related Information

See the following topics for related Dealer information:

■ Dealers (on page 817)

■ Working with the Dealer Homepage (on page 817)

■ Managing Dealers (on page 819)

Vehicles

Use the Vehicles pages to create, update, and track vehicles.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking vehicle information, the Vehicles tab may be excluded from your setup.

Working with the Vehicle Homepage

The Vehicle Homepage is the starting point for managing vehicles.

NOTE: Your company administrator can customise the layout of your Vehicle Homepage. In addition, if your user role includes the Personalise Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Vehicle

You can create a vehicle by clicking the New button in the My Recently Viewed Vehicles section. For more information, see Creating Records (on page 51) and Vehicle Fields (on page 831).

Working with Vehicle Lists

The Vehicle Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for vehicles.

Vehicle List	Filters
All Vehicles	All vehicles, sorted by the vehicle identification number (VIN)
All Recently Modified Vehicles	All vehicles, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 118).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Vehicles

The My Recently Modified Vehicles section shows the vehicles that you viewed most recently.

Viewing Vehicle-Related Service Requests

The Vehicle-Related Service Request section shows the following information:

- **Service Number.** The service requests assigned to you. Click SR Number to review the service request.
- **Subject.** The title of the service request.
- **Asset.** The asset corresponding to the service request.
- **Show Full List.** Expands the list of vehicle-related service requests.

To expand the list, click Show Full List.

Adding Sections to Your Vehicle Homepage

If your user role includes the Personalise Homepages privilege, you can add some or all of the following sections to your Vehicle Homepage:

- Recently Created Vehicles
- Recently Modified Vehicles
- My Recently Created Vehicles
- My Recently Modified Vehicles
- One or more report sections (Your company administrator can make report sections available for display on your Vehicle Homepage.)

Complete the following task to add sections to the Vehicle Homepage.

To add sections to your Vehicle Homepage

1 On the Vehicle Homepage, click Edit Layout.

2 On the Vehicle Homepage Layout page, click the arrows to add or remove sections, and to organise the sections on the page.

3 Click Save.

Related Information

See the following topics for related Vehicle information:

- Vehicle Fields (on page 831)
- Managing Vehicles (on page 824)

Managing Vehicles

The following topics describe optional configuration that can be performed by your company administrator when managing vehicles in Oracle CRM On Demand:

- Enabling a Vehicle Product Type (on page 827)

- Enabling Vehicle Association on Service Requests (on page 826)

Click a topic to see step-by-step procedures for performing the following:

- Updating Vehicle Ownership (on page 828)

- Tracking Service requests for Vehicles (on page 827)

- Tracking Sales Histories of Vehicles (on page 829)

- Tracking Service Histories of Vehicles (on page 829)

- Tracking Financial Information for Vehicles (on page 830)

NOTE: This feature is not part of the standard application, so it might not be available in your version of Oracle CRM On Demand.

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)

- Updating Record Details (on page 103)

- Linking Records to Your Selected Record (on page 104)

- Working with Lists (on page 112)

- Working with Records (on page 46)

- Adding Notes (on page 143)

- Transferring Ownership of Records (on page 133)

- Tracking Assets (on page 280) (includes linking vehicles to accounts)

- Attaching Files and URLs to Records (on page 150)

- Viewing Audit Trails for Records (on page 164)

- Deleting and Restoring Records (on page 161)

- Tracking Assets (on page 280) (includes linking vehicles to accounts)

- Renaming Record Types

NOTE: Company administrators can customise Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

TIP: In the standard application, vehicles are included in the lists of portfolio accounts in Oracle CRM On Demand. However, if your administrator selects the Exclude Vehicle/Assets Records from Portfolio Accounts check box on the company profile, then vehicles are not included in the lists of portfolio accounts.

Related Information

See the following topics for related Vehicle information:

■ Vehicles (on page 823)

■ Vehicle Fields (on page 831)

■ Working With the Vehicle Homepage (on page 823)

■ Reports (on page 907)

Enabling Vehicle Association on Service Requests

The default service request layout does not display vehicle association. However, your company administrator can configure a custom service request page layout by completing the following procedure.

To display vehicle association on a service requests record

1 From any page, click Admin, click Application Customisation, click Service Requests, and click Service Request Page Layout.

2 In the Page Layout list, perform one of the following:

■ Click the Edit link for an existing layout to modify it.

■ Click the New Layout button to create a new layout.

■ Click the Copy link to copy an existing layout.

The Page Layout Wizard is displayed.

NOTE: The number of steps in the Page Layout Wizard can differ depending on the Page Layout link that you click.

3 In Step 1 Layout Name, enter a name for the layout and a description (optional).

4 In Step 2 Field Set-up, select the field characteristics as necessary.

5 In Step 3 Field Layout, make sure that the Vehicle field is available on the Service Request Page Layout.

6 Click Finish to exit the Wizard.

You now must assign the new custom layout to a user role, using the Role Management Wizard.

7 Click Admin, click User Management and Access Controls, then click Role Management:

8 Find the role to which you want to assign the custom service request page layout, and click Edit.

9 In Step 6 of the wizard, change the Page Layout Name to the custom service request page layout for the service request record.

10 Click Finish to exit the wizard.

NOTE: By enabling Vehicle association, you can also update the Vehicle Search page layout to alter the association selection that a user sees. For more information, see Managing Search Layouts.

Enabling a Vehicle Product Type

Normally, to add products, your company administrator uses the Content Management portion of the Admin tool. For Vehicles, the administrator can update the product record with the Product Type field set to Vehicle. Note that the Product Type for Vehicle records is not displayed in the product default layout. To enable the Product Type for a vehicle, your company administrator can create a custom product page layout by completing the steps in the following procedure.

To display the product type for a vehicle record

1   From any page, click Admin, click Application Customisation, click Product, click Product Page Layout and copy the Product Page Standard Layout to a new layout.

2   Complete the Page Layout Wizard for the Product:

   a   In Step 1, provide a name for your layout.

   b   In Step 2, select the Required box for the Product Type.

   c   In Step 3, make sure that the Product Type field is listed in the Key Product Information section on the right.

   d   Click Finish to exit the wizard.

3   Assign the new custom layout to a user role as required using the Role Management Wizard.

   a   Click Admin, click User Management and Access Controls, then click Role Management:

   b   Find the role that you want to assign to the custom product page layout and click Edit.

   c   In Step 6 of the wizard, change the Page Layout Name to the custom product page layout for the Product record.

   d   Click Finish to exit the wizard.

   The user whose role has been modified can create a product record with the Product Type field by using the Content Management functionality. For more information on adding products, see Setting Up Company Products.

For more information, see Setting Up Company Products.

Tracking Service Requests for Vehicles

When you want to review, update, or create a service request for a vehicle, update the vehicle record or create the service request for the associated vehicle.

To track the service request for a vehicle

1 Select the vehicle that you want to track.

   For more information on selecting vehicles, see Finding Records (on page 68).

2 On the Vehicle Detail page, scroll down and click New in the Service Request title bar.

   NOTE: When creating a service request, selecting a dealer allows the user to change from all contacts search to contacts for the related dealer. You can change the filter to run a query as you require.

3 On the Service Request Edit page, fill in the information.

The following table describes some field information for service histories.

Field	Comments
Service Number	Oracle CRM On Demand generates this number.
Subject	The title or short description of this activity.
Priority	The priority of the service request, such as 1-ASAP, 2-High, or 3-Medium.
Status	The status of the service request, such as Opened, Pending, or Closed.
Opened Time	Indicates the time when the service request was opened. Oracle CRM On Demand generates this number.
Contact	The contact related to the service request.
Dealer	The dealer related to the service request.
Owner	The owner of the service request.

NOTE: When creating a service request, selecting a dealer changes all contacts to only those contacts who are associated with the dealer by default. The filter can be changed to query all contacts.

Updating Vehicle Ownership

When a vehicle is sold, update the vehicle record to track the vehicle ownership.

1 Select the vehicle.

   For instructions on selecting vehicles, see Finding Records (on page 68).

2 On the Vehicle Detail page, click Edit in the title bar.

   For information on the fields in the Vehicle Details page, see Vehicle Fields (on page 831).

3 On the Vehicle Edit page, update the Owned By field in the Vehicle record.

4 Save the record:

- ■ To save this record and then open the Vehicle Detail page (where you can link information to this record), click Save.

- ■ To save this record and then open the Edit page (where you can create another vehicle record), click Save & New Vehicle.

Tracking Sales Histories of Vehicles

When you want to review, update, or create a sales history for a vehicle, update the vehicle record.

To track the vehicle{\f2 '}s sales history

1 Select the vehicle.

For instructions on selecting vehicles, see Finding Records (on page 68).

2 On the Vehicle Detail page, scroll down to the Sales History section and click Add in the title bar.

NOTE: If the Sales History section is not visible on your Vehicle Detail page, click the Edit Layout link in the upper right corner of the page, and add the Sales History section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

3 On the Sales History Edit page, fill in the information.

The following table describes some field information for sales histories.

Field	Comments
Sales Number	System-generated number.
Currency Code	Defaults to your currency.
Owner First Name	When you select the last name, this field is filled in.
Owner Last Name	Owner of the vehicle.

4 Save the record.

Tracking Service Histories of Vehicles

When you want to review, update, or create a service history for a vehicle, update the vehicle record. The service history can include service requests and other services related to the vehicle.

To track the vehicle's service history

1 Select the vehicle.

For instructions on selecting vehicles, see Finding Records (on page 68).

2 On the Vehicle Detail page, scroll down and click Add in the Service History title bar.

   NOTE: If the Service History section is not visible on your Vehicle Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Service History section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

3 On the Service History Edit page, fill in the information.

   The following table describes some field information for service histories.

Field	Comments
SH #	Service History number which has a limit of 30 characters. Oracle CRM On Demand generates this number.
SR #	Service request record linked to this service history. Limit of 64 characters.
Owner Last Name	Owner of the vehicle. Limit of 50 characters.
Service Date	Default is today{\f2 '}s date.
Currency Code	Defaults to your currency. Limit of 20 characters.
Service Name	A name or number linked with the service history record. Limit of 100 characters.
Make	The manufacturer or brand name of the vehicle. Read-only.
Owner First Name	When you select the last name, this field is filled in. Limit of 50 characters.
Service Provider	Dealer or other service provider who serviced the vehicle. Limit of 100 characters.
Description	This field has a limit of 16,350 characters.

4 Save the record.

Tracking Financial Information for Vehicles

You can track the financial information for a vehicle.

To track the financial information for a vehicle

1 Select the vehicle.

   For instructions on selecting vehicles, see Finding Records (on page 68).

2 On the Vehicle Detail page, scroll down and click Add in the Financial Information title bar.

NOTE: If the Financial Information section is not visible on your Vehicle Detail page, click the Edit Layout link in the upper right corner of the page, and add the Financial Information section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

3 On the Financial Information Edit page, fill in the information.

The following table describes some field information for financial information.

Field	Comments
Financial Detail #	System-generated number. Limit of 15 characters.
Finance Provider	Limit of 30 characters.

Vehicle Fields

Use the Vehicle Edit page to add a vehicle or update details for an existing vehicle. The Vehicle Edit page shows the complete set of fields for a vehicle.

NOTE: Company administrators can customise your application in a variety of ways, such as changing names for record types, fields and options in picklists. Therefore, the information that you see might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Vehicle Information	
VIN	Vehicle identification number (VIN). Limit of 100 characters.
Make	The manufacturer or brand name of the vehicle. Default values include: Metro Motors, Toyota and Unknown Make.
Model	Model of the vehicle. Default values are: 4Runner and Tacoma.
Year	The year that the vehicle was manufactured. This is a numerical picklist and does not accept non-numerical characters.
Product Name	The name of the product. Typically, to add products, your company administrator uses Content Management functionality. For Vehicles, the company administrator can update the product record with the Product Type field set to Vehicle. Note that the Product Type is not exposed in the default product layout. The procedure to expose Product Type for vehicles is described in Enabling a Vehicle Product Type (on page 827).
Trim	The trim for the vehicle. Default values are: 2WD and Prerunner.
Door	The number of doors for the vehicle. The default values are: 2 Door, 3

Field	Description
	Door and 4 Door
Exterior Colour	The colour of the vehicle.
Vehicle Currency	The currency designation for the vehicle price, for example, U.S. dollars (USD).
Owner	The owner of the vehicle record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Additional Vehicle Information	
Used/New	Whether the vehicle is new or used.
Product Type	The type of vehicle. Limit of 30 characters. NOTE: This field is read-only.
Interior Colour	Colour of the vehicle's interior, for example, Red.
Transmission	The vehicle{\f2 '}s transmission type. The default values are: Auto, Manual and Option.
Engine	The vehicle&rsquo;s engine type. The default values are: 4 Cylinder, 6 Cylinder, 8 Cylinder, 10 Cylinder and Option.
Body	The vehicle{\f2 '}s body type, for example, Coupe or Cabriolet.
Owned By	The vehicle ownership type, for example, Business or Company Car.
Contact	The contact person for the vehicle. Limit of 100 characters. NOTE: This field is read-only.
Account	The account linked with the vehicle.
Account Site	The location of the account. Limit of 50 characters. NOTE: This field is read-only.
Selling Dealer	Name of the dealer selling the vehicle. Limit of 100 characters.
Servicing Dealer	Name of the dealer servicing the vehicle. Limit of 100 characters.
MSRP	The manufacturer's suggested retail price (MSRP) in the currency used in the Vehicle record. Limit of 22 characters.
Dealer Invoice Price	The dealer{\f2 '}s invoice price in the currency used in the Vehicle record. Limit of 22 characters.

Field	Description
Status	The current status of the vehicle, for example, Production.
Location	The location of the vehicle, for example, Dealer Garage.
Current Mileage	The current number of miles that appears on the vehicles odometer. Limit of 22 characters (number).
Warranty Type	The type of warranty that is provided with the vehicle, for example, Full or Extended.
Licence Number	The owner{\f2 '}s licence number. Limit of 30 characters.
Licence State	The county for which the licence is issued.
Description	Limit of 250 characters.

Note: To configure any of the picklist fields, for example Model, Trim, Door, your company administrator can customise the application for the picklist values as described in Changing Picklist Values.

Custom Fields

NOTE: Company administrators, whose role includes the Customise Application privilege, typically create custom fields.

Any custom field that is created in an Asset record appears as the same custom field in the Vehicle record.   A Vehicle record inherits a custom field in an Asset record. However, any custom field created in a Vehicle record does not automatically appear in the Asset record.

If you want to see the same custom field in both the Asset view and the Vehicle view, your company administrator can create the custom field in the Asset record, and make it visible to both the Asset view and the Vehicle view.

If you do not want to see the same custom field in both the Asset view and the Vehicle record, your company administrator can create the Asset specific custom field for the Asset, and make the custom field visible only in the Asset view.

For more information on custom fields, see About Custom Fields.

Additional Fields

Several fields do not appear on the Vehicle Detail page by default: Part #, Purchase Date, Purchase Price, Quantity, Ship Date, Install Date, Expiry Date, Notify Date, Product Category and Contract.

Your company administrator can change the definitions of these fields as required. For more information on changing field definitions, see Creating and Editing Fields. To make the fields visible, your company administrator must include these fields in the page layout. For more information on making these fields visible on a page, see Customising Static Page Layouts.

Related Information

See the following topics for related Vehicle information:

- Working With the Vehicle Homepage (on page 823)
- Managing Vehicles (on page 824)

13 Personalising Your Application

You can use the My Set-up pages to personalise Oracle CRM On Demand. For step-by-step instructions, click one of the following topics:

- Updating Your Personal Details (on page 836)
- Setting Your Default Search Record Type (on page 846)
- Setting Your Theme (on page 846)
- Setting Your Record Preview Mode (on page 847)
- Changing Your Language Setting (on page 848)
- Viewing Audit Trail Fields (on page 849)
- Managing Your Quota (on page 849)
- Reviewing Your Sign-In Activity (on page 850)
- Changing Your Password (on page 850)
- Setting Up Your Security Questions (on page 851)
- Reviewing Your Delegate Information (on page 852)
- Adding Delegated Users (on page 853)
- Granting Sign-In Access to Technical Support (see "Granting Sign In Access to Technical Support" on page 853)
- Displaying Your Tabs (on page 854)
- Changing Your Detail Page Layout (on page 855)
- Personalising Field Layouts (on page 861)
- Managing Record Indicators for Related Information Sections (on page 863)
- Personalising Related Information Layouts (on page 856)
- Changing Your Homepage Layouts (on page 865)
- Changing Your Action Bar Layout (on page 865)
- Setting Up Your Calendar (on page 866)
- Accessing the Data and Integration Tools (on page 869)
- Viewing Your Export Requests (on page 870)

- ▪ [Embedding a Favourite Lists Widget](#) (on page 872)
- ▪ [Embedding a Message Centre Widget](#) (on page 873)
- ▪ [Embedding a Reports Widget](#) (on page 874)
- ▪ [Embedding a Simple List Widget](#) (on page 874)

Related Topics

See the following topics for related information about personalising your application:

- ▪ [About On Demand Widgets](#) (on page 872)
- ▪ [Importing Your Contacts](#) (on page 294)
- ▪ [Using the Offline Client](#) (on page 878)
- ▪ [Adding Emails from Microsoft Outlook and Lotus Notes](#) (on page 885)

Updating Your Personal Details

You can update your personal details, such as your address and phone number. Your company administrator controls the layout and information that you see on your Personal Detail page, consequently there might be differences between the following descriptions and what you see.

NOTE: Changes made to your Default Language, Currency, Time Zone and Country on the Personal Profile pages are not reflected in all reports and analyses until you sign out and sign in again.

To update your personal details

1 In the upper right corner of any page, click the My Set-up global link.

2 In the Personal Profile section, click the Personal Profile link.

3 In the Personal Information section, click the My Profile link.

4 In the Personal Detail section, click Edit.

5 In the Personal Edit form, update the information, then save the record.

   Note: You must sign out and in again to activate some of the changes (Language, Locale, Time Zone and Currency).

The following table describes some fields you can review or update.

Field	Description
Key User Information	
First Name	The first name of the user. Limit of 50 characters. This is a required

Field	Description
	field.
Last Name	The last name of the user. Limit of 50 characters. This is a required field.
Middle Name	The middle name of the user. Limit of 50 characters.
Mr/Ms	The salutation of the user.
Status	This read-only field indicates the status of the user. Only active users can access Oracle CRM On Demand.
Reports To	This read-only field indicates the manager of the user. **NOTE:** Depending on how your company administrator sets up the user page layouts for your company, you might see the Reports To (Alias) field instead of the Reports To field. The Reports To (Alias) field shows the short identifier for the manager of the user.
Job Title	This read-only field shows the job title of the user
Region	The region or area where the user is located. Limit of 40 characters.
Subregion	A further refinement of the region or area where the user is located. Limit of 40 characters.
Role	This read-only field indicates the role assigned to the user in Oracle CRM On Demand. User roles define the features in Oracle CRM On Demand that a user has the privileges to use, the set of permissions the user is given to work with protected information, and the user interface settings that display information.
Primary Group	The group to which this user has been added. Read-only.

Field	Description
Default Book	The user book or custom book that you see by default in the Book selector at the start of your session in Oracle CRM On Demand. The default book applies to the Book selector in all areas of Oracle CRM On Demand other than the Reports Homepage or the Dashboard Homepage. The setting in the Default Book field does not limit your access to records. You can select a different book in the Book selector. You can change your default book. You can select any book to which you have visibility, that is, you can select any book of which you are a member, or any subbook of a book of which you are a member. However, to select a custom book as your default book, your user role must allow you to access the Book record type. That is, the Has Access check box must be selected for the Book record type on your user role. **NOTE:** Your administrator can specify a default book for each record type for you. If a default book is specified for a record type for you, then in the Book selector, the default book for the record type takes precedence over the default book that is specified in the Default Book field on your personal profile.
Default Book for Analytics	The user book or custom book that you see by default in the Book selector on the Reports Homepage and the Dashboard Homepage. This setting does not limit your access to data. You can select a different book in the Book selector.
Preserve Default Book	This check box applies to the Book selector in all areas of Oracle CRM On Demand except the Reports Homepage and the Dashboard Homepage. The Preserve Default Book check box works as follows: ■ If this check box is selected, then the Book selector shows the book that is selected in the Default Book field in your user profile each time that you open any page or window where the Book selector is available. You can select a different book in the Book selector in any page or window. However, the next time that you revisit that page or window, or you open any other page or window where the Book selector is available, you see the default book in the Book selector. Your earlier selection in the Book selector is lost. ■ If this check box is not selected, then the Book selector shows the book that is selected in the Default Book field in your user profile until you select a different book in the Book selector. After you select a different book in the Book selector, you continue to see the new book in the Book selector for that record type until you sign out and sign in again.
User Detail Information	
Alias	A short identifier for the user that is used to assign or show ownership on specific record types. For example, enter the user's preferred name or nickname. This is a required field and is set up by the company

Field	Description
	administrator.
User ID	A unique system identifier for a user used in conjunction with Company Sign In ID to sign in to the application. This is a required field, which the company administrator sets up.
Email	The complete email address for a user, such as isample@rightequip.co.uk. The email address is used for system notifications such as a reset password notification. This is a required field, which the company administrator sets up.
Secondary Email	The secondary email address for the user.
Work Phone #	The user's work telephone number. This is a required field.
Cellular Phone #	The user's mobile phone number.
Company Sign In ID	The company to which the user belongs. This is a default field and is set up at the time the company is created.
User Sign-In ID	The ID with which the user signs in to the application. The ID is a combination of the Company Sign In ID and the User ID, separated by a forward slash. The User Sign in ID is a required field and is set up by the company administrator.
Contact Preferences	
Never Call	Select this check box if you do not want to receive calls from Oracle CRM On Demand Marketing.
Never Mail	Select this check box if you do not want to receive mail from Oracle CRM On Demand Marketing.
Never Email	Select this check box if you do not want to receive email messages from Oracle CRM On Demand Marketing.
Always Send Critical Alerts	If this check box is selected, you receive email messages containing important information from Oracle CRM On Demand. These messages include: ■ Critical information about product updates and service changes for Oracle CRM On Demand and related products ■ Instructions and schedules for upgrades to major new releases ■ High priority or emergency communications to supplement normal support processes (for example, in the case of a hardware failure) This field cannot be updated on your Personal Details page. Only company administrators have the ability to update this check box for users, from the User Details page. **NOTE:** This check box is not used to determine which users receive the system alerts issued by Oracle CRM On Demand Customer Care,

Field	Description
	such as reminders for upcoming scheduled maintenance.
User Geographic Information	
Language, Locale, Currency, Time Zone	Your company administrator sets up the default settings for these items. You can override the defaults by clicking the picklist for each item, and selecting the value that you want. For more information on these fields, see About Profile Settings for Users (on page 844). You must sign out and sign in again to activate any change to your language, locale, currency, or time zone.
User Security Information	
Reporting Subject Areas	Use this picklist to set your visibility to real-time report records in Oracle CRM On Demand Answers. These reports provide real-time analyses of data. You can select one of the following values: Manager Visibility - Allows you to see your own data, plus data directly owned by your subordinates. (This is the default setting.) Team Visibility - Allows you to see your own data, plus data shared with you by the Account and Opportunity Team. If you do not define the Reporting Subject Areas setting, the company-wide setting that is set up by your company administrator applies. For more information on reports, see Reports (on page 907), particularly the About Visibility to Records topic.
Historical Subject Areas	Use this picklist to set your visibility to records for the Analytics subject areas in Oracle CRM On Demand Answers. Analytics reports have to do with historical or trend analysis, or contain more complex calculations than those found in real-time reports. You can select one of the following values: Manager Visibility - Allows you to see your own data, plus data directly owned by your subordinates. (This is the default setting.) Team Visibility - Allows you to see your own data, plus data shared with you by the Account and Opportunity Team. Full Visibility - This setting combines Manager Visibility, Team Visibility, and books. If you do not define the Historical Subject Areas setting, the company-wide setting that is set up by your company administrator applies. For more information on reports, see Reports (on page 907), particularly the About Visibility to Records topic.
Role-Based Can Read All Records	Use this picklist if you want Oracle CRM On Demand Answers reporting to use the Can Read All Records setting on record-type basis, as defined on the Record Type Access page within the Role management

Field	Description
	wizard. For example, if the Can Read All Records visibility setting is selected by your company administrator for your user role on a given record type, (by clicking Admin, User Management and Access Controls, Role Management, then editing a role and clicking Record Type Access), you can view all records of that record type in Oracle CRM On Demand Answers, provided the Role-Based Can Read All Records setting is enabled either through the Company Profile or your User Profile. See About the Role-Based Can Read All Records Setting (on page 845) for guidance on when and how to enable the Role-Base Can Read all Records. If you do not select Role-Based Can Read All Records, then Oracle CRM On Demand Answers reporting uses the visibility set on Reporting Subject Areas and Historical Subject Areas fields.
External Identifier for Single Sign On	Read-only. For more information, see Setting Up Your Company Profile and Global Defaults.
Last Sign In	A system-generated field. For information on reviewing all your sign-in attempts, see Reviewing Your Sign-In Activity (on page 850).
Communications Settings	
Display Click-to-Dial Popup	This check box is for users who are set up with Oracle Contact On Demand. Oracle Contact On Demand renders phone numbers as links that you can click on the List and Detail pages. If you select the Display Click-to-Dial Popup check box, and then click a phone number link, you are prompted with a Click-To-Dial window before the Oracle Contact On Demand places the call. For more information about placing internal or external calls, see Placing Calls (on page 444).
Display Communication Homepage Inbox for	Select a value from the menu to determine the period during which the Communication Homepage inbox displays activities, for example, Last Month, Last Day, and so on. Oracle CRM On Demand filters these activities. The filter is based on the activity start time. The shorter the period the fewer the number of communications activities that are displayed. If you select All from the menu, or leave the menu blank, then the Communications page displays all communications. You must log out and log in again for this change to take effect.
Display Communication Homepage recently completed activities for	Select a value from the menu to determine the period during which the Communication Homepage displays the recently completed activities, for example, Last Month, Last Day, and so on. Oracle CRM On Demand filters these activities. The filter is based on the activity end time. The shorter the period, the fewer the number of communications activities that are displayed. If you select All from the menu, or leave the menu blank, then the Communications page displays all activities. You must log out and log in again for this change to take effect.

Field	Description
Additional Information	
Default Theme	This picklist allows you to select the available application-wide themes for your application when you sign in to Oracle CRM On Demand using a desktop or laptop computer. A theme changes the look and feel of the application, including its background colour, hyperlinks, and icons. Several predefined themes are available. However, your company administrator can create custom themes in Oracle CRM On Demand. A blank value indicates that you have to use the theme that your company administrator has set in the company profile. For more information on creating custom themes, see Creating New Themes.
Tablet Theme	The tablet theme is automatically used when you sign in to Oracle CRM On Demand using a tablet computer or other touch-screen device, provided that the tablet computer or touch-screen device is detected by Oracle CRM On Demand. If you do not select a default theme and a tablet theme in your personal profile, then the themes that are specified for your user role are used, and if no themes are specified for your user role, then the themes that are specified for your company are used. For more information on how themes work in Oracle CRM On Demand, see About the Interface (on page 26).
Default Search Record Type	This picklist allows you to change the default search record type to be displayed in the Action bar search. (For example, change Contact to Account or another record type that you can access.) The action bar search box defaults to this record type every time you sign in to the application regardless of where you left it the last time you were signed into the application.
Show Welcome Page on Sign In	This check box allows you to specify whether the Oracle CRM On Demand Welcome Page is displayed when you sign in to the application.
Record Preview Mode	This picklist allows you to enable the record preview functionality and to specify how the preview window opens. Depending on the setting you select, the preview window opens when you hover your pointer over a link to a record, or when you click on a preview icon that appears when you hover your pointer over a link to a record. The preview window shows the first section of the Detail page of the record. You also have the option of disabling the record preview functionality by selecting Off in this field. The record preview setting can be specified at company level by your company administrator, and by each user. Your personal setting overrides the setting for the company. If this field is blank, the record preview setting for the company is used.
Head-up Display	If the head-up display functionality is turned on, links to the related information sections of the page (such as linked records sections) are available in the head-up display at the bottom of your browser window. You can click the links to go to the related information sections without having to scroll down the page. You can collapse the

Field	Description
	head-up display by clicking the minus icon (-) in the display; to expand the display again, click the plus icon (+). Your expand or collapse setting in the head-up display is maintained for all record types until you change it again, even if you sign out of the application and sign in again. You can also remove the head-up display completely from your Detail pages, by turning off the functionality in your personal profile. **NOTE:** The head-up display functionality can be turned on or off at company level, and by each individual user. Your personal setting overrides the company setting. The colours in the head-up display are determined by the theme you are using. For more information about choosing a theme, see Setting Your Theme (on page 846).
Related Information Format	If your user role has the Personalise Related Information Display Format privilege, then you can choose to show the related information sections on record Detail pages as lists or as tabs. If the Related Information Format field in your personal profile is blank, then the setting for your user role is used; and if the Related Information Format field on your user role is blank, then the setting for the company is used.
User Time Zone Support for Reporting Subject Areas	If this check box is selected on your user profile, then the dates and times in real-time reports are shown according to your time zone. Depending on how your company administrator sets up your Personal Profile page, you might be able to change this setting. If this check box is not selected on your user profile, then the dates and times shown in reports are displayed according to the company's time zone.
Freeze List Column Header	This picklist determines how you view column headers for lists and search results in Oracle CRM On Demand. You can select the following values: ■ **On.** When you scroll down a list of records, and the column header row reaches the top of the browser window, the column labels are always visible. ■ **Off.** When you scroll down a list of records and the column header row reaches the top of the browser window, the column labels are no longer visible. **NOTE:** If the Freeze List Column Header field in your personal profile is blank, then the setting for the company is used.

About Profile Settings for Users

Each company has at least one designated company administrator who sets up and customises Oracle CRM On Demand for the entire organisation. Company administrators set up some defaults that every user inherits initially, but each user can override these initial default settings. The following table describes what the settings affect.

Setting Name	Description
Time Zone	The application supports Universal Time Code (UTC) so that all times and dates are shown according to the user's time zone. For example, an appointment scheduled for 11:00 a.m. PST displays as 2:00 p.m. for a user whose setting is EST, because of the three-hour time difference.
Locale	The Locale setting determines the formatting for numbers, currencies, phone numbers, times, and dates. For example, users who select the German - Germany locale setting see currency amounts that display 110.000,00, whereas users who select the English - United States setting see the same amount as 110,000.00. Users should select the format they are most comfortable with.
Language	The Language setting allows users to change the language for the user interface, online help, and tutorials. Depending on the company's default language, users may see certain items in reports in a language other than their default.
Currency	The Currency setting provides the default currency amount linked with all new records the user creates. When a user views revenue reports, they display in the user's default currency. If a manager sees cumulative revenue from users with different currencies, she sees the amount in her default currency (company administrators must set up exchange rates for this to occur).
	However, forecasts are always rolled up to the company's default currency. For example, a user with U.S. dollars as his default currency sees his forecast converted to euros, if his company's currency is euros.
Country	The Country setting on the user profile controls the template that is used to display the default country-specific address fields when the user creates a new record with an address. For example, if the Country field on the user's profile is set to France, then when the user creates a record with an address, such as an account record, the French template is used to display address fields that are specific to France for both the shipping and billing addresses when the new record page first opens.Oracle CRM On Demand has address templates specific to over 60 countries.

Setting Name	Description
Phone	The Phone formatting is determined by the Locale setting. The application adjusts for out-of-the-area phone numbers so that users see the entire sequence they need to dial. For example, a user in the U.S. is required to dial 011 when dialling internationally. Therefore, when a user enters +44 3333 333 333 for the United Kingdom, the number displays as 011 +44 3333 333 333.

NOTE: Users should enter the prefix plus sign (+) before international numbers.

Phone fields have a phone icon next to them. Clicking on the icon opens a phone verification window, which allows users to verify if the application has correctly identified the number: country code, city/area code, local number, and any extension for the number. Closing that window prompts the application to enter the correct dialling sequence.

Additionally, if users want to determine the country code for a country, they can click the phone icon, select the country, and save the information. The country code for the country displays in the Phone field. |

NOTE: When these settings are changed, the user must sign out and sign in again for Oracle CRM On Demand to display data with the new settings.

About the Role-Based Can Read All Records Setting

Your company administrator sets up the Role-Based Can Read All Records check box in the Company Profile page, but a user can override this setting in the user's User Profile page. Depending on how the Role-Based Can Read All Records check box is set up, Oracle CRM On Demand Answers reporting uses the visibility set on an object basis on the user's role definition, or the visibility set on the Reporting Subject Areas and Historical Subject Areas fields on the Company Profile and User Profile pages. For more information on company and user profiles, see About Profile Settings for Companies and Users (see "About Profile Settings for Users" on page 844).

The following table provides information on when and how to enable the Role-Based Can Read All Records setting.

Role-Based Can Read All Records Setting		Visibility of Role Record Type
Company Profile Setting	User Profile Setting	
Yes	Yes	Enabled
Yes	No	Disabled
Yes	NULL	Enabled (displays the company profile setting by default)
NULL	Yes	Enabled

Role-Based Can Read All Records Setting		Visibility of Role Record Type
NULL	NULL	Disabled (displays the company profile setting by default)
NULL	No	Disabled

To update your personal profile, see Updating Your Personal Details (on page 836).

To update the company profile (company administrators only), see Setting Up Your Company Profile and Global Defaults.

Setting Your Default Search Record Type

You can set your default search record type from your personal profile information. For example, you might want to modify your default search record type for your targeted searches from a Contact record to an Account record.   For more information on using searches with Oracle CRM On Demand, see Finding Records (on page 68). To set your default search record type, complete the steps in the following procedure.

To set your default search record type

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

2   In the Personal Profile section, click the Personal Profile link.

3   In the Personal Information section, click the My Profile link

4   In the Personal Detail page, click Edit.

5   In the Personal Edit page, scroll down to the Additional Information section.

6   Select the record type that you want in the Default Search Record Type picklist.

7   Save the record.

Note: You must sign out and sign in again to Oracle CRM On Demand to see the changes.

Setting Your Theme

You can set your UI Theme from your personal profile information to one of the several predefined themes in Oracle CRM On Demand or to a custom theme already created by your company administrator.   For more information on creating new themes, see Creating New Themes. A blank theme indicates that no theme is defined for you. In this case, the company theme or role theme (if defined) is used.

To set your theme, complete the steps in the following procedure. When you specify a theme, it takes precedence over any other theme that is specified at the role or company level.

To set your theme

1 In the upper right corner of any page, click the My Set-up global link.

2 In the Personal Profile section, click the Personal Profile link.

3 In the Personal Information section, click the My Profile link and click Edit.

4 Scroll down to the Additional Information section.

5 Select the theme that you want in the Default Name picklist.

6 (Optional) To select the theme you want to use when using a tablet computer or other touch-screen device, click the Lookup icon (magnifying glass) in the Tablet Theme field.

   NOTE: Oracle CRM On Demand will use the theme specified in the Tablet Theme field provided that the tablet computer or touch-screen device is detected by Oracle CRM On Demand. If you do not select a default theme and a tablet theme in your personal profile, then the themes that are specified for your user role are used, and if no themes are specified for your user role, then the themes that are specified for your company are used. If a tablet theme is not specified at any level, then your default theme is used. For information about how themes work in Oracle CRM On Demand, see About the Interface (on page 26).

Setting Your Record Preview Mode

If the record preview functionality is enabled, you can preview records from record links in many places in Oracle CRM On Demand, including the following:

- ■ My Homepage

- ■ Record Homepages

- ■ Record List pages

- ■ Record Detail pages (including lists of related records)

- ■ Action bar

The preview window shows the first section of the Detail page of the record. You can set your record preview mode in your Personal Details page. Depending on the setting you select, the preview window opens when you rest your pointer on a link to a record, or when you click a preview icon that appears when you rest your pointer on a link to a record. You can also disable the record preview functionality.

Your company administrator can specify the record preview mode at company level, and each user can also specify the record preview mode in their Personal Details page. Your personal setting overrides the setting for the company. If the Record Preview Mode field in your personal profile is blank, then the record preview mode for the company is used.

To set your record preview mode, complete the steps in the following procedure.

To set your record preview mode

1 In the upper-right corner of any page, click My Set-up.

2 In the Personal Profile section, click Personal Profile.

3 In the Personal Information section, click My Profile.

4 In the Personal Detail page, click Edit.

5 In the Personal Edit page, scroll down to the Additional Information section.

6 In the Record Preview Mode field, select the mode that you want from the picklist.

   If you want to use the record preview mode for the company, select the blank option from the picklist.

7 Save the record.

Changing Your Language Setting

The language setting in your personal details controls the language that you see in the user interface, online help, and tutorials. Your company administrator initially specifies your language, but you can change this setting in your personal details. Depending on the company's default language, you might see certain items in reports in a language other than the language you set as your default.

To change your language setting, complete the steps in the following procedure.

To change your language setting

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

2 In the Personal Profile section, click Personal Profile.

3 In the Personal Information section, click My Profile.

4 In the Personal Detail page, click Edit.

5 In the Personal Edit page, scroll down to the User Geographic Information section.

6 Select the language that you want in the Language picklist.

7 Save the record.

8 Sign out of Oracle CRM On Demand, and sign back in again to activate the change.

Viewing Audit Trail Fields

To view the activity of software applications, such as Web services and Oracle Outlook Email Integration On Demand, complete the steps in the following procedure.

To view audit trail fields

1 In the upper right corner of any page, click the My Set-up global link.

2 In the Personal Profile section, click the Personal Profile link.

3 In the Personal Information section, click the My Profile link.

4 Scroll down to the Audit Trail section to review the fields that are enabled for audit.

Managing Your Quota

Either you or your company administrator can set up your quotas. As an end user, you do not require any special privilege, however your company administrator requires the Manage Users privilege to set up your quota.

You can review and modify existing quotas or enter new quotas and calculate them by:

■ Entering a yearly quota, which the system spreads evenly over the year

■ Entering a quota for each month, which the system totals for the year

You can make a quota active at any time. After you activate a quota, Oracle CRM On Demand uses the quota information to populate fields in the Forecasting pages. It saves your targets for each year, allowing you to review your target history, and compare your forecasts with your quotas. For additional information, see Managing Quotas (on page 346).

NOTE: You can have more than one active quota per year. Since only active quotas are used when creating your forecast, make sure that you activate all of the quotas that you want included in your forecast.

To define your quota

1 In the upper right corner of any page, click the My Set-up global link.

2 In the Personal Profile section, click the Personal Profile link.

3 In the Personal Information section, click the My Profile link.

4 In the Personal Detail page, scroll to the Quotas section.

5 In the Quotas section, click New Quota.

6 In the Edit Quota form, enter the Quota Begins and Name for the quota.

7 Perform one of the following:

- To spread a yearly quota evenly over the fiscal year, enter the amount in the Total Quota field and click Spread.

- To add the monthly quotas together, enter an amount for each month and click Sum.

  NOTE: Clicking Sum adds all monthly quota entries and displays the total in the Total field.

8 Save the record.

Reviewing Your Sign-In Activity

You can review your sign in activity, for example, the number of times you signed into the application.

NOTE: User sign-in records that are older than 90 days are continuously purged from Oracle CRM On Demand.

To review sign-in activity

1 In the upper right corner of any page, click the My Set-up global link.

2 In the Personal Profile section, click the Personal Profile link.

3 In the Personal Information section, click the My Profile link.

4 In the Personal Detail page, scroll down to the Sign In History section to review your sign-in activity.

This activity includes your sign-in activity from other applications, including Oracle CRM On Demand Integration for Office, Oracle Outlook Email Integration On Demand, and so on.

NOTE: The Type field in a sign-in record shows the channel through which the sign-in attempt was made. For example, if a sign-in attempt is made through a browser window, then the Type field shows the value Interactive. If a sign-in attempt is made through Web services, then the Type field shows the value Web Services.

Changing Your Password

Oracle CRM On Demand allows you to change your password at any time, provided that your role includes the Reset Personal Password privilege.

Note: If your company has implemented a solution where you must use Single Sign-On (SSO) to access Oracle CRM On Demand, you must reset your password using that solution, and not in Oracle CRM On Demand.

To change your password

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

2 In the Personal Profile section, click the Personal Profile link.

3 In the Personal Information section, click the Password Update link.

4 In the Password Update page, review the password policy before making any changes to your password.

Typically, the password policy is set by the company administrator and is subject to change.

5 In the Password Update section, fill in the fields.

6 Save the record.

Setting Up Your Security Questions

If you forget your password for Oracle CRM On Demand, your security questions are used. You set up your security questions when you sign in to Oracle CRM On Demand for the first time. However, you can change your security questions and answers at any time.

What Happens If You Forget Your Password?

If you forget your password for Oracle CRM On Demand, you can click the Can't Access Your Account? link on the Oracle CRM On Demand Sign-In page, and then click the I Forgot My Password link to reset your password. Oracle CRM On Demand then sends an email to you that contains a temporary link to the application. When you access the temporary link, you are required to answer your security questions for authentication. When you answer the questions correctly, then you can set up your password in Oracle CRM On Demand. For more information about resetting your password if you forget it, see Retrieving Your User Sign-In ID or Resetting Your Password (on page 172).

NOTE: If you forget your user sign-in ID, you can also use the Can't Access Your Account? link on the Oracle CRM On Demand Sign-In page to submit a request to have your user sign-in ID sent to you by email.

The following procedure describes how to set up your security questions.

To set up your security questions

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

2 In the Personal Profile section, click the Personal Profile link.

3 On the Personal Profile page, click the My Security Questions link.

4 On the My Security Questions page, if you are not setting up your security questions for the first time, enter your password for Oracle CRM On Demand in the Current Password field.

5 Select the questions, and enter the answers.

NOTE: An answer cannot exceed 100 characters.

6 Save the record.

TIP: Take note of the security questions and answers that you set up, so that you have the information readily available if you forget your password.

Reviewing Your Delegate Information

User delegation is a feature that allows a user who supports multiple people to see all of the records belonging to those people. If your company administrator has enabled the user delegation feature and your user role has been set up for user delegation, then you can do the following:

- View a list of the users for whom you are a delegate.
- View a list of the users who are delegates for you.
- Add delegates for yourself.

  For more information about adding delegated users, see Adding Delegated Users (on page 853).

To view a list of the users for whom you are a delegate, complete the steps in the following procedure.

To view a list of the users for whom you are a delegate

1 In the upper right corner of any page, click the My Set-up global link.

2 In the Personal Profile section, click the Personal Profile link.

3 In the Personal Information section, click the My Profile link.

4 On the Personal Detail page, scroll down to the Delegated From Users section to see a list of the users for whom you are a delegate.

To view a list of the users who are delegates for you, complete the steps in the following procedure.

To view a list of the users who are delegates for you

1 In the upper right corner of any page, click the My Set-up global link.

2 In the Personal Profile section, click the Personal Profile link.

3 In the Personal Information section, click the My Profile link.

4 On the Personal Detail page, scroll down to the Delegated To Users section to see a list of the users who are delegates for you.

NOTE: If the Delegated From Users section or the Delegated To Users section is not visible on your Personal Detail page, click Edit Layout in the upper-right corner of the page, and add the section to your page layout. If the section is not available to add to your page layout, then contact your company administrator.

Related Topics
About User Delegation

Adding Delegated Users

User delegation allows a user who supports multiple people to see all of the records belonging to those people. If your company administrator has enabled the user delegation feature and your user role has been set up for user delegation, then you can allow a user to act as a delegate for you by adding that user to your list of delegated users. Your delegated users gain owner access to the records owned by you.

Your company administrator can also appoint delegates for you. For more information on how company administrators appoint delegated users, see Managing Delegated Users (Administrator).

To add delegated users

1   In the upper right corner of any page, click the My Set-up global link.

2   In the Personal Profile section, click the Personal Profile link.

3   In the Personal Information section, click the My Profile link.

4   Scroll down to the Delegated To Users section, and click Add Users.

   NOTE: If the Delegated To Users section is not visible on your Personal Detail page, click Edit Layout in the upper-right corner of the page, and add the Delegated To Users section to your page layout. If the section is not available to add to your page layout, then contact your company administrator.

5   On the Delegated Users Edit page, click the Lookup icon to select the users that you want to add to the Delegated Users list.

6   If values are defined in the Delegated User Roles field, then you can optionally select a delegated user role for each user.

7   Click Save.

Related Topics
About User Delegation

Granting Sign In Access to Technical Support

You can grant permission to a technical support representative to access your Oracle CRM On Demand session. This access might be necessary to allow the technical support representative to troubleshoot a problem.

To grant sign in access to others

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

2 In the Personal Profile section, click the Personal Profile link.

3 In the Personal Information section, click the Sign In Access link.

4 On the Sign In Access page, enter a date and time range for the period of time you are allowing that person to have access to your session.

5 Save the record.

Note: If you want to terminate sign in access prior to the Access End Date that you specified, and you have already granted access using this feature, enter a new date and time range with dates that are in the past.

Displaying Your Tabs

The tabs across the top of your pages provide the starting point for managing your data. The role your company administrator assigns to you determines what tabs are available to you and the order in which they initially appear.

NOTE: You can personalise your tabs only if the Personalise Tabs privilege is enabled for your role. For more information, contact your company administrator.

The following procedure describes how to change the order in which your tabs appear.

To change your tab order

1 In the upper right corner of any page, click the My Set-up global link.

2 In the Layout Personalisation section, click the Personal Layout link.

3 In the Personal Tab Layout section, click the Tab Layout link.

4 In the Available Tabs section, select the tab you want to add, and then click the right arrow button to move it from the Available Tabs section to the Selected Tabs section.

  NOTE: You can select more than one tab at a time by holding down the SHIFT or CTRL key when you click to select the tabs.

5 In the Selected Tabs section, select one tab at a time and use the arrows to move the tab up or down until it appears in the order you want.

  NOTE: (Optional) To revert your tab layout to the default settings for your role, click Default.

6 Click OK and save the record.

Changing Your Detail Page Layout

Users can personalise the layout of the related information sections on the Detail page for a record type if the Personalise Detail Page - Related Information privilege is enabled for their user role. For step-by-step instructions for personalising related information layouts, see Personalising Related Information Layouts (on page 856).

Users can personalise the field layout on the Detail page for a record type when their user role is set up as follows:

◼ The Personalise Detail Page - Fields privilege is enabled for the role.

◼ A custom page layout is assigned to the role for the record type.

The personalised field layout that a user creates for the Detail page for a record type is also used for the pages where the user edits records of that record type. Depending on how the user's role is set up, the user's personalised field layout might also be used in the pages where the user enters information for a new record. For step-by-step instructions for personalising field layouts, see Personalising Field Layouts (on page 861).

About Accessing the Personal Layout Pages

If your user role allows you to personalise your Detail page layouts, then you can access the Personal Layout pages for a record type through the Edit Layout link in the Detail page of a record of that record type. You can also access the Personal Layout pages for the record-type Detail pages through the global My Setup link. Depending on the privileges that are enabled for your user role, the behaviour is as follows when you access the Personal Layout pages to personalise a Detail page layout:

◼ The Personal Layout page opens if your user role includes any two of the following privileges: Personalise Detail Page - Fields privilege, Personalise Detail Page - Related Information privilege, or Personal Detail Page - Records Indicator privilege.

On the Personal Layout page, there are three links, as follows:

◼ **Field Layout.** This link opens the Personal Layout - Fields page, where you can personalise the field layout for the record type.

NOTE: The Field Layout link is available on the Personal Layout page only if a custom page layout is assigned to your user role for the record type. If the Standard page layout for the record type is assigned to your user role, then the Field Layout link is not available.

◼ **Related Information Layout.** This link opens the Personal Layout - Related Information page, where you can personalise the layout of the related information sections on the Detail page for the record type.

◼ **Manage Record Indicator.** This link opens the Personal Layout – Record Indicator page, where you can set up   the related information sections so that indicators appear on the tabs for the related information sections to show whether any records are present in the sections.

◼ The Personal Layout - Fields page opens directly if your user role includes the Personalise Detail Page - Fields privilege but does not include the Personalise Detail Page – Related Information privilege or the Personal Detail Page - Records Indicator privilege.

◼ The Personal Layout - Related Information page opens directly if your user role includes the Personalise Detail Page - Related Information privilege but does not include the Personalise Detail Page - Fields privilege or the Personal Detail Page - Records Indicator privilege.

■ The Personal Layout - Records Indicator page opens directly if your user role includes the Personal Detail Page - Records Indicator privilege but does not include the Personalise Detail Page - Fields privilege or the Personal Detail Page - Related Information privilege.

Related Topics

For more information about personalising page layouts, see the following topics:

■ Personalising Related Information Layouts (on page 856)

■ Managing Record Indicators for Related Information Sections (on page 863)

■ Personalising Field Layouts (on page 861)

■ About the Layouts of New Record Pages (on page 50)

Personalising Related Information Layouts

If your user role has the Personalise Detail Page - Related Information privilege, then you can create a personalised layout of the related information sections on the Detail page for a record type. The related information sections show the different record types that can be linked to the selected record. For example, notes and activities are related information that can be linked to opportunities or contacts. Your company administrator determines the type and order of the related information sections that appear on each Detail page by default. You can change the order of the related information sections or hide any related information sections that you are not using. Changing these settings only affects your view of the application.

NOTE: If your company administrator removes the Personalise Detail Page - Related Information privilege from your user role, then you cannot personalise the layout of the related information sections on your Detail pages.

About Static and Dynamic Detail Page Layouts

Detail page layouts can be static or dynamic. When static page layouts are used, you see the same page layout for all records of a given record type. Dynamic page layouts allow your company administrator to specify different page layouts for different records of the same record type, depending on the value that is selected in a specific picklist field on the record. You can personalise both static and dynamic page layouts.

About Changes to Default Page Layouts After Personalised Related Information Layouts Are Created

Your company administrator can update a static page layout or any of the page layouts used in a dynamic layout at any time. After you create a personalised layout of the related information sections for a Detail page for a record type, any changes that the company administrator makes to the availability of related information sections on the default page layout are not immediately reflected in your personalised layout.

What Happens If Related Information Sections Are Added to the Default Page Layout?

Your company administrator might add new related information sections to a default page layout for a record type for your user role after you create a personalised layout for the record type. If that happens, and if you

want to add any of the new sections to your personalised layout for that page, then you must first reset your page layout to the default layout. You can then use the default page layout or create a new personalised layout that includes the new sections.

What Happens If Related Information Sections Are Removed from the Default Page Layout?

Your company administrator might remove related information sections from the default page layout for a record type for your user role. If any of the sections that the company administrator removes from the default page layout are included in your personalised layout for that page, then those sections continue to be available in your personalised layout until you remove them from your layout or you reset your layout to the default layout.

Personalising Related Information Layouts for Static Page Layouts

The following procedure describes how to personalise the layout of the related information sections for a static layout by accessing the Personal Layout page through the My Setup global link. You can also personalise the layout of the related information sections for a static page layout by clicking the Edit Layout link on a record Detail page. For static layouts, the behaviour is the same regardless of how you access the page.

To personalise the layout of the related information sections for a static Detail page layout

1   In the upper right corner of any page, click the My Set-up global link.

2   In the Layout Personalisation section, click the Personal Layout link.

3   In the Personal Detail Page Layout section, click the Layout page link whose detail page layout you want to change.

4   If the Personal Layout page opens, then click Related Information Layout.

5   In the Personal Layout - Related Information page, in the Available Related Information section, select the related information section that you want to appear, and click the arrow to move it to the Displayed Related Information section.

   TIP: You can select more than one section at a time by holding down the SHIFT or CTRL key.

6   In the Displayed Related Information section, select one section at a time and use the arrows to move the related information section up or down until it appears in the order you want.

7   Save the record.

After you personalise the layout of the related information sections, your new layout is used in the Detail page for all records of that record type until one of the following actions occurs:

■   You change the layout again.

■   You restore the layout of the related information sections to the default layout.

   NOTE: Restoring a field layout to the default layout does not affect any personalised layouts of related information sections. Similarly, restoring a personalised layout of related information sections to the default layout does not affect any personalised field layouts for the record type.

■ Your administrator resets the page layout for your role to the default layout.

NOTE: If an administrator resets the page layout for a record type to the default layout for a role, then all of the personalised field layouts and all of the personalised layouts of the related information sections for that record type are restored to the default for users who have that role. However, if an administrator assigns a new page layout for a record type to a role, then all users who have that role see the new field layout for the record type, but the users continue to see their personalised layouts of the related information sections for the record type until they restore their related information layouts to the default layout.

Personalising Related Information Layouts for Dynamic Page Layouts

When dynamic layouts are used, you might be able to create a personalised layout of the related information sections for each value in the picklist field that determines the dynamic rendering of the page layout. The functionality that allows you to create multiple personalised layouts of the related information sections for a record type is controlled by the Enable Personalisation of Individual Dynamic Page Layouts check box on the company profile, as follows:

■ If the Enable Personalisation of Individual Dynamic Page Layouts check box is deselected, then you can create only one personalised layout of the related information sections for a record type. After you personalise the layout for a record type, you see the same set of related information sections on the Detail page for all records of that type regardless of the value that is selected in the picklist field that determines the dynamic rendering of the page layout.

■ If the Enable Personalisation of Individual Dynamic Page Layouts check box on the company profile is selected, then you can create a personalised layout of the related information sections for each of the values in the picklist field that determines the dynamic rendering of the page layout.

The following procedure describes how to personalise the layout of the related information sections for dynamic Detail pages when the personalisation of individual dynamic page layouts is not enabled. This procedure describes how to personalise a dynamic layout by accessing the Personal Layout page through the My Set-up global link. You can also personalise a dynamic layout by clicking the Edit Layout link on a record Detail page. If the personalisation of individual dynamic layouts is not enabled, then the behaviour is the same regardless of how you access the page.

To personalise a dynamic layout when the personalisation of individual dynamic layouts is not enabled

1 In the upper right corner of any page, click the My Set-up global link.

2 In the Layout Personalisation section, click the Personal Layout link.

3 In the Personal Detail Page Layout section, click the Layout page link whose detail page layout you want to change.

4 If the Personal Layout page opens, then click Related Information Layout.

5 In the Personal Layout - Related Information page, in the Available Related Information section, select the related information section that you want to appear, and click the arrow to move it to the Displayed Related Information section.

TIP: You can select more than one section at a time by holding down the SHIFT or CTRL key.

6 In the Displayed Related Information section, select one section at a time and use the arrows to move the related information section up or down until it appears in the order you want.

7 Save the record.

After you personalise the layout of the related information sections, your new layout is used in the Detail page for all records of that record type regardless of the value in the picklist field that determines the dynamic layout of the page, until you change the layout again or until you restore the default layout for the Detail page, whichever comes first.

The following procedure describes how to personalise the layout of dynamic Detail pages when the personalisation of individual dynamic page layouts is enabled. This procedure describes how to personalise a dynamic layout by accessing the Personal Layout page through the My Set-up global link. You can also personalise a dynamic layout by clicking the Edit Layout link on a record Detail page. When the personalisation of individual dynamic layouts is enabled, the behaviour for dynamic layouts is as follows:

■ If you access the Personal Layout page through the My Set-up link, then you can create personalised layouts for all values in the picklist that determines the dynamic layout of the page.

■ If you access the Personal Layout page through the Edit Layout link on a Detail page, then you can create a personalised layout only for the value that is currently selected in the picklist that determines the dynamic layout of the page.

To personalise a dynamic layout when the personalisation of individual dynamic layouts is enabled

1 In the upper right corner of any page, click the My Set-up global link.

2 In the Layout Personalisation section, click the Personal Layout link.

3 In the Personal Detail Page Layout section, click the Layout page link whose detail page layout you want to change.

4 If the Personal Layout page opens, then click Related Information Layout.

5 In the Personal Layout - Related Information page, in the Driving Picklist Available Values section, select the value for which you want to create a personalised layout.

   NOTE: If you want to create a personalised layout that is to be used when no value is selected in the picklist field, then select the blank value in the picklist field.

6 In the Available Related Information section, select the related information section that you want to appear and use the directional arrow to move it to the Displayed Related Information section.

   TIP: You can select more than one section at a time by holding down the SHIFT or CTRL key.

7 In the Displayed Related Information section, select one section at a time, and click the arrows to move the related information section up or down until it appears in the order that you want.

8 Repeat steps 5 through 7 to create any additional personalised layouts that you want.

   NOTE: If you do not create a personalised layout for a picklist value, then the default page layout for that picklist value is used.

9 Save the record.

After you personalise the layout of the related information sections for a picklist value, your personalised layout is used in the Detail page for all records in which that picklist value is selected until you change the layout for the picklist value again or until you restore the default layout for the Detail page, whichever comes first.

Restoring Related Information Layouts to the Default Layouts

The following procedure describes how to restore a related information layout to the default layout by accessing the Personal Layout page through the My Set-up global link. You can also restore a related information layout to the default layout by clicking the Edit Layout link on a record Detail page. If the personalisation of individual dynamic layouts is enabled, then the behaviour for dynamic layouts is as follows:

- If you access the Personal Layout page through the global My Set-up link, then you can restore the default related information layouts for all of the values in the picklist field that determines the dynamic layout of the page. You can also restore the default related information layouts for some picklist values while keeping your personalised layouts for other picklist values.

- If you access the Personal Layout page through the Edit Layout link on a record Detail page, then you can restore only the default related information layout for the picklist value that is currently selected in the picklist field that determines the dynamic layout of the page. You cannot restore the default related information layouts for the other picklist values.

To restore a related information layout to the default layout

1 In the upper right corner of any page, click the My Set-up global link.

2 In the Layout Personalisation section, click the Personal Layout link.

3 In the Personal Detail Page Layout section, click the Layout page link whose detail page layout you want to change.

4 If the Personal Layout page opens, then click Related Information Layout.

5 In the Personal Layout - Related Information page, do one of the following:

- Click Default to restore the layout for a selected value in the Driving Picklist Available Values column to the default layout.

- Click Default All to restore the layouts for all of the values in the Driving Picklist Available Values column to the default layouts.

   NOTE: The Default All button is available only for some personal detail page layouts.

For information about how personalised page layouts interact with page layouts for roles, see How Personalised Related Information Layouts Interact with Page Layouts for Roles.

Related Information Format on Record Detail Pages

If your user role has the Personalise Related Information Display Format privilege, then you can also choose to show the related information sections on record Detail pages as lists or as tabs, by setting the Related

Information Format option in your personal profile. If the Related Information Format field in your personal profile is blank, then the setting for your user role is used; and if the Related Information Format field on your user role is blank, then the setting for the company is used. For information about changing the Related Information Format option in your personal profile, see Updating Your Personal Details (on page 836).

Personalising Field Layouts

Users can personalise the field layout on the Detail page for a record type when their user role is set up as follows:

- The Personalise Detail Page - Fields privilege is enabled for the role.

- A custom page layout is assigned to the role for the record type.

You can personalise the field layouts for both static and dynamic layouts. When personalising field layouts, note the following points:

- All of the fields that are available on the custom layout that is assigned to your user role for a record type appear by default on your layout until you personalise the layout.

- You can remove (hide) some of the fields on your personalised layout, but you cannot add any fields that do not appear on the default layout to your personalised layout.

- You cannot remove required fields from your layout. In addition, administrators can specify that certain fields must always appear on a layout, so that you cannot remove those fields from your personalised layout. In the Personal Layout - Fields page, the fields that must always appear on the layout are shown in the same font colour as the required fields.

Depending on the type of page layout that is used, you might be able to personalise a field layout through the My Setup global link, or through the Edit Layout link on record Detail pages, or through both of these links. The following table shows which of the links you can use to personalise the field layouts. In all cases, the page layout assigned to your user role must be a custom page layout, that is, you cannot personalise the standard page layout for a record type in Oracle CRM On Demand. The information in this table also applies when you want to restore a personalised field layout to the default field layout. For information about restoring a field layout to the default field layout, see the Restoring Field Layouts to the Default Layouts section of this topic.

Layout Type	My Setup Link	Edit Layout Link
Static layout.	Yes	Yes
Default layout for a dynamic layout. For information, see the note after this table.	Yes	Yes. The driving picklist field for the dynamic layout must be blank on the record Detail page.
Layout for a specific value in the driving picklist.	No	Yes. The appropriate value must be selected in the driving picklist field for the dynamic layout.

NOTE: The default layout for a dynamic layout is the layout that is used when the driving picklist field for the dynamic layout is blank on a record.

To personalise a field layout for a record type, complete the steps in the following procedure.

To personalise a field layout for a record type

1 In the upper right corner of any page, click the My Set-up global link.

   NOTE: If you want to personalise the field layout that is used for a specific value in the driving picklist field for a dynamic layout, then instead of clicking the My Setup link, open a record that has the appropriate value in the driving picklist field, click Edit Layout, and then skip to step 4.

2 In the Layout Personalisation section, click Personal Layout.

3 In the Personal Detail Page Layout section, click the Layout page link for the page you want to personalise.

   For example, if you want to personalise the field layout for the Account record type, then click Account Layout.

4 If the Personal Layout page opens, then click Field Layout.

5 In the Personal Layout - Fields page, use the arrows to reorganise the fields on the layout.

   You can move fields within a section of the page, and you can move fields from one section of the page to a different section. If you do not want a certain field to appear on your personalised page layout, then move the field to the Available Fields section.

   NOTE: If you move a required field or a field that your administrator has specified that it must always appear on the layout to the Available Fields section, then an error message appears when you try to save the layout, and you must move the field back to any one of the sections on the layout.

6 Save your changes.

After a user creates a personalised field layout, that layout is used each time that the user opens or edits a record of that record type until one of the following actions occurs:

■ The user changes the field layout again.

■ The user restores the default field layout for the page.

   NOTE: Restoring a field layout to the default layout does not affect any personalised layouts of related information sections. Similarly, restoring a personalised layout of related information sections to the default layout does not affect any personalised field layouts for the record type.

■ The administrator resets the page layout for the user's role to the default layout, or assigns a different layout to the role for that record type.

   NOTE: If an administrator resets the page layout for a record type to the default layout for a role, then all of the personalised field layouts and all of the personalised layouts of the related information sections for that record type are restored to the default for users who have that role. However, if an administrator assigns a new page layout for a record type to a role, then all users who have that role see the new field layout for the record type, but the users continue to see their personalised layouts of the related information sections for the record type until they restore their related information layouts to the default layout.

Depending on how the user's role is set up, the user's personalised field layout might also be used in the page where the user enters information for a new record. For more information about the field layout on new record pages, see About the Layouts of New Record Pages (on page 50).

Restoring Field Layouts to the Default Layouts

If you want to stop using a personalised field layout, then you can restore the field layout to the default layout for the record type for your role. Depending on the type of page layout that is used, you might be able to restore a field layout through the My Setup global link, or through the Edit Layout link on record Detail pages, or through both of these links. For information about which link to use, see the table in the preceding section of this topic.

To restore a personalised field layout to the default layout, complete the steps in the following procedure.

To restore a field layout to the default layout

1   In the upper right corner of any page, click the My Set-up global link.

   NOTE: If you want to restore the field layout that is used for a specific value in the driving picklist field for a dynamic layout to the default field layout for that value, then instead of clicking the My Setup link, open a record that has the appropriate value in the driving picklist field, click Edit Layout, and then skip to step 4.

2   In the Layout Personalisation section, click Personal Layout.

3   In the Personal Detail Page Layout section, click the Layout page link for the page that you want to restore to the default.

4   If the Personal Layout page opens, then click Field Layout.

5   In the Personal Layout - Fields page, click Default.

6   Save your changes.

The next time you open, edit, or create a record of that record type, you see the default layout assigned to your role for the record type.

Related Topics

See the following topic for related information about personalised field layouts:

■   How Personalised Field Layouts Interact with Page Layouts for Roles

Managing Record Indicators for Related Information Sections

If your user role has the Personalise Detail Page - Records Indicator privilege, then you can set up the related information sections so that indicators appear on the tabs for the related information sections to show whether any records are present in the sections. Your administrator can also configure the record indicators for the Detail pages for the record types at role level. If you do not personalise the record indicator settings for a record type, then the record indicator settings that are configured for the record type for your role are used. For more information on using record indicators, and record indicator behaviour, see Oracle CRM On Demand

Page-by-Page Overview (on page 34) and About the Enhanced View for Related Information Tabs (on page 66).

To personalise the record indicator settings for a record type, complete the steps in the following procedure.

To personalise the record indicator settings for a record type

1 In the upper right corner of any page, click the My Set-up global link.

2 In the Layout Personalisation section, click the Personal Layout link.

3 In the Personal Detail Page Layout section, click the *record type* Layout page link.

4 If the Personal Layout page opens, then click the Manage Record Indicator link.

   NOTE: You can also access the Personal Layout - Record Indicator page by clicking the Edit Layout link on any record detail page.

5 In the Personal Layout - Record Indicator page, in the Available Related Information list, select the related information sections for which you want a record indicator to appear, and click the arrow to move them to the Selected Related Information list.

   TIP: You can select more than one section at a time by holding down the SHIFT or CTRL key.

6 Save your changes.

After you personalise the record indicator settings for a record type, your personalised settings apply to the Detail page for all records of that record type until one of the following actions occurs:

■ You update the record indicator settings on your related information sections again.

■ You restore the record indicator settings for the record type to the default settings for that record type for your role. Any updates originally performed by your administrator at role level are implemented.

■ Your administrator resets the page layout for your role to the default layout. All of the personalised settings for displaying record indicators for related information sections for that record type are restored to the settings configured for the record type at role level.

To restore the record indicator settings for a record type to the default settings for the record type for your role, complete the steps in the following procedure.

To restore the record indicators settings for a record type to the default settings

■ In the Personal Layout - Record Indicator page, click Default.

Changing Your Homepage Layouts

If your user role includes the Personalise Homepages privilege, you can add and remove sections from your Homepage layouts (My Homepage, Account Homepage, Contact Homepage, Lead Homepage, Opportunity Homepage, and Service Request Homepage). Your company administrator configures the Homepage layouts that you see by default.

NOTE: You can also personalise Homepages by clicking the Edit Layout link on each Homepage.

To change your Homepage Layout

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

2   In the Layout Personalisation section, click Personal Layout.

3   In the Personal Layout page, in the Personal Homepage Layout section, click the Homepage Layout that you want to modify (for example My Homepage Layout).

4   In the Available Sections section of the page, select the section that you want to display on your Homepage and use the arrows to move the section to the Left Side section or the Right Side section.

   TIP: You can select more than one section at a time by holding down the SHIFT or CTRL key when you click to select the sections.

5   In the Left Side or Right Side section, select one section at a time and use the arrows to move the section up or down until it appears in the order you want on the Homepage.

6   Save the record.

Changing Your Action Bar Layout

Your company administrator assigns an action bar layout to each user role. Your company administrator can also make the Action bar unavailable to your user role.

If the Action bar is available to your user role, then it appears on the left side of all Oracle CRM On Demand pages by default. You can hide and show the Action bar as required. For more information, see About Showing or Hiding the Action Bar (on page 40).

If the Personalise Action Bar privilege is enabled for your role, then you can display or hide any of the Action bar sections, including Web applets, that your company administrator has made available in the Action bar layout for your user role. For more information about your user-role settings, contact your company administrator.

You can specify how a record is displayed if it is the only record returned by a search. The record can be opened directly in a record Detail page, or it can be shown in a list page. The option that controls this behaviour is the Navigate Directly to Detail Page If Only One Record Is Returned check box, in the Quick Search Options section of the Action bar layout page in your personal setup. The following considerations apply to the Navigate Directly to Detail Page If Only One Record Is Returned check box:

■   By default, the check box is not selected.

■ If the check box is not selected and a search returns only one record, then the record is shown in a list page, and you can open the record from the list page.

■ If the check box is selected and a search returns only one record, then the record opens directly in a record Detail page.

■ After you select or deselect the check box, the setting applies to all searches in the Action bar and in advanced searches that return only one record until you change the setting of the check box again.

■ The setting of the check box applies to searches in the Action bar and to advanced searches only. Lists that you open in other areas in Oracle CRM On Demand are always shown in a list page, even if the list contains only one record.

To change your Action bar layout

1 In the upper right corner of any page, click the My Set-up global link.

2 In the Layout Personalisation section, click Personal Layout.

3 In the Personal Layout page, in the Personal Action Bar Layout section, click Action Bar Layout.

4 In the Personal Layout page, use the arrows to move the sections as follows:

■ Move the sections you want to appear in the Action bar from the Available Sections section to the Displayed Sections section

■ Move the sections you do not want to appear in the Action bar from the Displayed Sections section to the Available Sections section.

NOTE: For the Action bar to show in Oracle CRM On Demand, there must be at least one section in the Displayed Sections section of the page.

5 Scroll to the Customise Favourites section and select the appropriate option to have new favourites added to the start or the end of a favourites list (Favourite Records and Favourite Lists), depending on your preference.

For more information on Favourite Records, see Favourite Records Page (on page 112). For more information on Favourite Lists, see Favourite Lists Page (on page 130).

6 In the Quick Search Options section, select or deselect the Navigate Directly to Detail Page If Only One Record Is Returned check box to specify the behaviour when a search returns only one record, as follows:

■ If you want the record to open directly in the record Detail page, then select the check box.

■ If you want the record to be displayed in a list page, then deselect the check box.

7 Save your changes.

Setting Up Your Calendar

This topic describes how to set up your calendar through the My Setup global link.

When setting up your default calendar view, you can do the following:

■ Select the calendar view that you want to display each time that you click the Calendar tab.

■ Specify which day is shown as the first day of the week in your calendar and in the date selectors where you select values for date fields in Oracle CRM On Demand.

■ Select the days of the week and the business hours that you want to show in your calendar, if you do not want to use the company-wide settings.

By default, all of the check boxes for the days of the week are deselected, and the Business Hours Start Time and Business Hours End Time fields are blank. When specifying business hours, you can enter only one start time and one end time. You cannot specify different business hours for individual work days. If you enter a start time for your business hours, then you must also enter an end time, and the end time must be later than the start time. Similarly, if you enter an end time, then you must also enter a start time. If necessary, Oracle CRM On Demand converts the start time and end time that you enter to the appropriate format for your locale after you save your changes.

In the calendar, the time slots can start and end on the hour if you use a classic theme, and the time slots can start and end on the hour or half-hour if you use a modern calendar. For the calendar views, Oracle CRM On Demand rounds the start time for the business hours down to the nearest hour or half-hour as appropriate, and rounds the end time for the business hours up to the nearest hour or half-hour. For example, if you enter 08:40 A.M. as your start time, then Oracle CRM On Demand rounds the start time down to 08:00 A.M. for the calendar views if you use a classic theme, and rounds it down to 08:30 A.M. if you use a modern theme. If you enter 5:40 P.M. as your end time, then Oracle CRM On Demand rounds the end time up to 06:00 P.M. for the calendar views in either a classic theme or a modern theme.

For information about how the work days and business hours are shown in your calendar views, see About Calendar Work Days and Business Hours (on page 182).

■ Select additional information to display in the appointments in your calendar views. By default, the information from the Subject, Location, and Contact Name fields in the appointment is shown in the appointments in the calendar views. You can choose to display the following additional information:

■ The name of the account that is linked to the appointment. The account name is a link to the account record.

■ The status of the appointment.

■ The phone number of the primary contact that is linked to the appointment. The phone number is a link to the contact record. If the Work Phone field is populated on the contact record, then the work phone number is shown. If the Work Phone field is not populated on the contact record, and if the Cellular Phone field is populated, then the cellular phone number is shown.

■ Specify whether you want to receive reminders for activities that you own or on which you are included in the list of users, if reminders are configured on the activities. The options in the Activity Notification field are as follows:

■ **Email.** If you select this option, then you receive the email reminders.

■ **None.** If you select this option, then you do not receive the reminders.

■ **Blank.** If you leave the Activity Notification field blank, then the option that is selected in the Activity Notification field at company level applies to you. The default option at company level is None, but your administrator can select the Email option.

To set up your calendar, complete the steps in the following procedure. For more information on calendars, see Calendar and Activities (on page 177).

Before you begin. To share your calendar with another user or to set up custom group calendar views, your user role must include the Share Calendar privilege.

To set up your calendar

1 In the upper right corner of any page, click the My Set-up global link.

2 In the Calendar Set-up section, click Calendar Settings.

3 To set up your default calendar view, do the following:

a Click Default Calendar View.

b Select a calendar view.

c Select the day that is to be shown as the first day of the week in your calendar.

By default, the Calendar Week Starts On field is blank. If you leave this field blank, then the company-wide setting for the first day of the week is used.

NOTE: After you change the start day of the week, you must sign out of Oracle CRM On Demand and then sign in again to see the change in your calendar and in the date selectors where you select values for date fields in Oracle CRM On Demand.

d In the Calendar Work Week section, set up the work days and the business hours for your calendar, as follows:

- Select the check box for each day that you want to show as a work day in your calendar. If you select the check box for one or more days, then only those days are shown as work days in your daily and weekly user calendar views, regardless of the work days that are specified at company level. If the check boxes for all days are deselected, then the work days that are specified at company level apply to your calendar.

- If you want to specify a start time for your business hours that is different from the time specified at company level, then enter the start time in the Business Hours Start Time field.

- If you specified a start time for your business hours, then enter the end time in the Business Hours End Time field. The end time must be later than the start time.

NOTE: If you do not enter a start time and an end time for the business hours, then the business hours that are specified at company level apply to your calendar.

e In the Appointment Information Preferences section, select the check boxes for the additional information that you want to display in the appointments in your calendar views.

f In the Activity Notification field, select the option that you want, or leave the field blank if you want the setting at company level to apply to you.

g Save your changes.

4 To share your calendar with another user:

    a Click Share Calendar.

    b In My Calendar Share List, click Add Users.

    c In the Grant New Users window, use the Lookup icon to add users with whom you want to share your calendar.

5 To set up custom group calendar views:

    a Click Manage Group Views.

    b In My Custom Views, click Add.

    c Complete the fields in the Manage View window, and then save the record.

Setting up custom group calendar views allows you to manage your view to other users availability. When you create a new appointment, go to the Group Calendar tab and select the Calendar group you or your company administrator created to view availability.

Accessing the Data and Integration Tools

On your Personal Homepage, you can find links to tools that allow you to import data and to integrate data in Oracle CRM On Demand with other applications.

NOTE: Your company administrator sets up and enables access to the available clients.   The clients include: Oracle Outlook Email Integration On Demand and Oracle Offline On Demand.

To access the data and integration tools

1 In the upper right corner of any page, click the My Set-up global link.

2 In your Personal Homepage, in the Data and Integration Tools section, click the link for the tool you want to use:

- To import your contacts, click Data and Integration Tools, then click Import Your Contacts.

  For more information, see Importing Your Contacts (on page 294).

- To view information about your pending and completed import requests, click Data and Integration Tools, then click Import Request Queue.

  For more information, see Reviewing Import Results.

- To view information about your pending and completed export requests, click Data and Integration Tools, and then click Export Request Queue.

  For more information, see Viewing Your Export Requests (on page 870).

- To install Oracle CRM On Demand Desktop, click Data and Integration Tools, then click Oracle CRM On Demand Desktop, and follow the instructions to complete the installation.

For more information, see Installing Oracle CRM On Demand Desktop.

■ To link specific emails to account, contact, lead, opportunity or service request records in Oracle CRM On Demand, click Data and Integration Tools, then click Oracle Outlook Email Integration On Demand.

For more information, see Adding Emails from Microsoft Outlook and Lotus Notes (on page 885).

■ To embed a widget, click Embed CRM On Demand Content.

For more information, see the following topics:

- ■ Embedding a Favourite Lists Widget (on page 872)
- ■ Embedding a Message Centre Widget (on page 873)
- ■ Embedding a Reports Widget (on page 874)
- ■ Embedding a Simple List Widget (on page 874)

Related Topic

See the following topic for related information about data and integration tools:

■ About On Demand Widgets (on page 872)

Viewing Your Export Requests

The Personal Export Request Queue page displays all pending and completed export requests that you submitted. If a request is in the Pending Requests section, you can click Refresh to see if the request has completed. When the request has completed, you can drill down on a request to retrieve the output file.

NOTE: Depending on your privileges, some export requests might not be visible to you, or you might not be able to retrieve some output files.

To view export requests

1 In the upper-right corner of any page, click My Set-up.

2 Click Data &Integration Tools.

3 Click Export Request Queue.

The Personal Export Request Queue page appears, showing the details of the export requests. The following table describes the export request information.

Export Record Information	Description
Type	The type of request: Personal or Company.
Export Type	The type of export:

Export Record Information	Description
	■ **Full**. A full export of your company's data. ■ **Partial.** A partial export of your company's data. ■ **List.** An export request made from a List page. Only exports performed by the logged-in user are displayed.
Record Type	The record type. For partial requests that include child records, the child record is indicated in the format *Parent*:*Child*, for example: Account:Contact.
List	For list export requests, this field indicates the name of the list.
Status	The status, for example: In Progress or Completed.
Client Name	The name of the client application.
Requested For	The user for whom the request was submitted.
Requested By	The user who submitted the request. An administrator can create a personal extract request for a user through Web services.
Submitted	The time and date when the export request was submitted.
Completed	The time and date when the export request was finished.

The following procedure describes how to retrieve the ZIP file for a request.

To retrieve the ZIP file for a request

1 In the Completed Requests section, click the Export Type or Record Type link to open the List Export Request Details or Export Request Details page.

2 In the Export Request Attachment section of the page, in the row that contains the ZIP file, you can do the following:

■ Select Download from the record-level menu to open or save the ZIP file.

The ZIP file consists of an export summary text file and CSV file for each type of record that you exported. A list export request has only one CSV file.

■ Click Delete to delete the file.

About On Demand Widgets

Oracle CRM On Demand provides you with HTML code that you can use to embed a number of On Demand widgets in desktop applications that support Web widgets. You can also embed Web widgets in portals, or in any standalone Web page. A Web widget is a portable piece of third-party code that can be embedded in HTML. If your company administrator has made this feature available to you, HTML code that you can use to embed On Demand widgets in other applications is provided in the Embed CRM On Demand Content page in Oracle CRM On Demand.

When you successfully embed this HTML code in your application, an Oracle CRM On Demand sign-in window appears. Then, you can enter your sign-in details to access your Oracle CRM On Demand Favourite Lists, Message Centre, and so on. You can open Oracle CRM On Demand in a new browser window by clicking Open Application.

Note: This feature is available in your Oracle CRM On Demand application only if it is enabled by your company administrator. To confirm if this feature is enabled in your Oracle CRM On Demand application, click the My Setup global link. If the feature is enabled, the Embed On Demand Content link is available on your Personal Homepage. If your company administrator has not assigned you permission to use On Demand widgets, and you try to sign in to an On Demand widget, the sign-in attempt fails.

The following On Demand widgets are available:

- **Favourite Lists Widget.** This On Demand widget displays your favourite Oracle CRM On Demand lists, for example, All Opportunities, My Accounts, and so on. Favourite Lists are located in the Action Bar of the Oracle CRM On Demand Homepage. For more information on embedding the Favourite Lists Widget, see Embedding a Favourite Lists Widget (on page 872).

- **Message Centre Widget.** This On Demand widget allows you to access messages received in Oracle CRM On Demand without requiring you to first sign in to Oracle CRM On Demand. The Message Centre is located in the Action Bar of the Oracle CRM On Demand Homepage. For more information on embedding the Message Centre Widget, see Embedding a Message Centre Widget (on page 873).

- **Reports Widget.** This On Demand widget displays reports created in Oracle CRM On Demand. For more information on embedding the Reports Widget, see Embedding a Reports Widget (on page 874).

- **Simple List Widget.** This On Demand widget displays a one-column list of shortcuts to Oracle CRM On Demand records. For more information on embedding the Simple List Widget, see Embedding a Simple List Widget (on page 874).

TIP: If your theme uses a larger font, then a scroll bar might display in your favourite lists widget. You can remove this scroll bar by editing the height and width values for the Web Tab HTML fields in your widget. For more information, see Displaying External Web Pages in Tabs.

Embedding a Favourite Lists Widget

You can embed your favourite lists from Oracle CRM On Demand (for example, All Opportunities, My Accounts, and so on) in desktop applications that support Web widgets. You can also embed them in portals and in standalone Web pages.

NOTE: This feature is available to you in Oracle CRM On Demand only if the feature is enabled by your company administrator.

To embed Favourite Lists

1   In the upper right corner of any page, click the My Set-up global link.

2   In your Personal Homepage, in the Data and Integration Tools section, click Embed CRM On Demand Content.

3   From the Favourite Lists Widget section, copy the HTML code to your application.

When you successfully embed this HTML code in your application, an Oracle CRM On Demand sign-in window appears.

4   Enter your Oracle CRM On Demand sign-in details to access your Favourite Lists data.

TIP: If your theme uses a larger font, then a scroll bar might display in your favourite lists widget. You can remove this scroll bar by editing the height and width values for the Web Tab HTML fields in your widget. For more information, see Displaying External Web Pages in Tabs.

Embedding a Message Centre Widget

You can embed the Oracle CRM On Demand Message Centre in desktop applications that support Web widgets. You can also embed it in portals and in standalone Web pages. Using the Message Centre widget, you can access messages received in Oracle CRM On Demand without logging in to Oracle CRM On Demand. The Message Centre is located in the Action Bar of the Oracle CRM On Demand Homepage.

NOTE: This feature is available to you in Oracle CRM On Demand only if the feature is enabled by your company administrator.

To embed Message Centre

1   In the upper right corner of any page, click the My Set-up global link.

2   In your Personal Homepage, in the Data and Integration Tools section, click Embed CRM On Demand Content.

3   From the Message Centre Widget section, copy the HTML code to your application.

When you successfully embed this HTML code in your application, an Oracle CRM On Demand sign-in window appears.

4   Enter your Oracle CRM On Demand sign-in details to access the messages in your Message Centre.

5   Click Refresh to access the new messages.

Embedding a Reports Widget

You can embed reports and dashboards from Oracle CRM On Demand in desktop applications that support Web widgets. You can also embed them in portals and in standalone Web pages without requiring you to log in to the Oracle CRM On Demand application.

NOTE: This feature is available to you in Oracle CRM On Demand only if the feature is enabled by your company administrator.

To embed reports and dashboards

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

2 In your Personal Homepage, in the Data and Integration Tools section, click Embed CRM On Demand Content.

3 In the Reports Widget section, in the Type field, select Single Report or Dashboard.

4 In the Path field, enter the paths of the reports (or dashboards) that you want to display.

   NOTE: These paths must be separated by colons (:). For more information on creating report paths, see Creating Homepage Custom Reports.

5 Click Show New HTML.

6 Copy the HTML code to your application.

   When you successfully embed this HTML code in your application, an Oracle CRM On Demand sign-in window appears.

7 Enter your Oracle CRM On Demand sign-in details to access your reports or dashboards.

For more information on reports, see Reports (on page 907). For more information on dashboards, see Dashboards (on page 1295).

Embedding a Simple List Widget

This On Demand widget allows you to embed a simple list of records in desktop applications that support Web widgets. You can also embed them in portals and in standalone Web pages without requiring you to log in to the Oracle CRM On Demand application. The Simple List widget displays shortcuts to lists for the standard record types except Fund and Fund Request.

NOTE: This feature is available in your Oracle CRM On Demand application only if it is enabled by your company administrator.

To embed Simple Lists

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

2 In your Personal Homepage, in the Data and Integration Tools section, click Embed CRM On Demand Content.

3 In the Simple List Widget section, select a list from the menu.

4 Copy the HTML code to your application.

When you successfully embed this HTML code in your application, an Oracle CRM On Demand sign-in window appears.

5 Enter your Oracle CRM On Demand sign-in details to access your list.

6 To view a different list, click Configure.

NOTE: This action changes the available list for the duration of the session. You can change the list as many times as you want during your session. However, the list reverts to the original list after you log out of your session.

14 Working with Other Applications

Oracle CRM On Demand works with these applications to provide additional functionality:

■ Oracle Offline On Demand

You can copy accounts (and their linked contacts and opportunities), tasks, and appointments to Oracle Offline On Demand (the Offline client) on your laptop or desktop. This allows you to work offline, disconnected from the Internet. When you reconnect to the Internet, you can upload your changes to your company's Oracle CRM On Demand application.

NOTE: From Release 33, only existing customers can access the Offline client. New users cannot download the Offline client.

■ Microsoft Outlook and Lotus Notes Email Integration

Through Oracle Outlook Email Integration On Demand and Oracle Notes Email Integration On Demand, you can link specific emails to account, contact, lead, opportunity or service request records in Oracle CRM On Demand. This feature allows you to store critical emails with the records to which they relate.

■ Microsoft Word

You can use your Oracle CRM On Demand data to create mail merges and mass email in Microsoft Word using Oracle CRM On Demand Integration for Office.

■ Microsoft Excel

You can create refreshable offline Microsoft Excel reports containing your Oracle CRM On Demand data using Oracle CRM On Demand Integration for Office.

■ Segmentation Wizard

You can use the Segmentation Wizard to generate contact segments (that is, lists of contacts) based on a combination of account, contact, opportunity, and service request fields in Oracle CRM On Demand.

Checking Your System Requirements

Make sure that your computer meets the system requirements before you install the software. For more information, see the Oracle CRM On Demand Web site http://crmondemand.oracle.com/en/products/system-requirements/index.html.

Using the Offline Client

Using Oracle Offline On Demand (the Offline client), you can do much of your work, such as adding accounts, updating opportunities linked to accounts, marking tasks as completed, and setting up appointments, while you are disconnected from the Internet.

To work with the Offline client, you copy or download the records from Oracle CRM On Demand to your computer. When you download records, you can limit the records that you want to include, based on the criteria that you set up.

After downloading, you can view or update these records as well as create new records while working offline. The user interface (UI) for Offline client is similar to Oracle CRM On Demand UI, but Offline client offers a subset of the functionality that Oracle CRM On Demand has. The following features are not supported in the Offline client:

- **Business Process Management.**   Because the Offline client operates as a disconnected client, it does not support server-based functions, such as workflows, field validation, custom default values, or postdefault values. For more information, see About Field Management.

- **Page Layouts.** Based on the limits in Microsoft Excel, the maximum number of fields that can be displayed in the Offline client page layout is 250. Because the Offline client inherits page layouts from the online page layout defined for the user, this limit affects the Offline client as well.

- **Tab Display.** To download records successfully to the Offline client, the corresponding record type tab must be displayed as part of the user's online tab layout.   For example, if you want to download accounts to the Offline client, then the Accounts tab must be displayed in Oracle CRM On Demand for the user.

When you reconnect to the Internet, you can upload the new record information to Oracle CRM On Demand at your company. The process of keeping both sets of records consistent is called *synchronisation*.

NOTE: To use the Offline client, the administrator must set the Enable Offline Access privilege in your user role.

NOTE: Shared addressing is not compatible with Oracle Offline On Demand. If shared addresses are enabled for the company, and if you are creating new account or contact records with addresses in Oracle Offline On Demand, then data uploads from Oracle Offline On Demand to Oracle CRM On Demand fail. However, if you create new account or contact records without addresses, then the data uploads correctly from Oracle Offline On Demand to Oracle CRM On Demand. For more information on shared addresses, see Addresses.

Related Topics

See the following topics for related information:

- What Records You Can Use Offline (on page 879)

- Downloading Records to Your Offline Client (on page 881)

- Uploading Records From Your Offline Client (on page 884)

- About Conflict Resolution with the Offline Client (on page 885)

What Records You Can Use Offline

You can download a subset of the total information that you have access to in Oracle CRM On Demand. The following table shows you what record types you can download or upload, and the records that are linked to those records.

This primary record type	Contains the secondary record types when downloaded or uploaded	Which also contains the following tertiary record types
Accounts	■ Opportunities	■ Contacts ■ Appointments ■ Tasks
	■ Contacts	
	■ Completed Activities	
	■ Open Activities	
Contacts	■ Accounts	■ Opportunities ■ Contacts ■ Appointments ■ Tasks
	■ Opportunities	■ Contacts ■ Appointments ■ Tasks
	■ Open Activities	
	■ Completed Activities	
	■ Contact Relationships	
Opportunities	■ Contacts	■ Accounts ■ Contacts ■ Appointments ■ Tasks
	■ Open Activities	
	■ Completed Activities	

Configuring the Offline Client

This topic describes how to configure the download settings of the Oracle Offline On Demand using the System Information Page.

To configure the system information for the Offline Client

1 Open the Offline client.

2 Click Help, and then Information to open the System Information page.

3 Use the following information to configure your system requirements:

- **User Sign ID.** The Oracle CRM On Demand sign-in used during the last successful download or upload. This field is automatically populated.

- **Single Sign-On ID.** Enter your Single Sign-On ID. Populate this field only if your company is using Single Sign-On for Oracle CRM On Demand.

- **Authentication Type.** Select one of the following types of sign-in the Offline client must use:

  - **User Sign-In.** Offline client prompts the user to enter the standard Oracle CRM On Demand sign-in and password credentials. This is the default setting.

  - **User Sign-In/Single Sign-On.** Offline client prompts the user to select the type of sign-in to use for each upload and download request.

  - **Single Sign-On.** Offline client prompts the user to enter the credentials for a Single Sign-On sign-in.

- **Save Download Settings.** Select True from the menu if you want Offline client to save the primary record list and the appointments and tasks settings in subsequent downloads. If you select True, the settings are saved for your next successful download. If you select False, the Offline client prompts you to select a primary record list each time that you request a download of data.

NOTE: If the saved primary record type list is renamed or deleted, Oracle CRM On Demand prompts you to select a new list for your next download request.

- **List Downloaded.** This is the last successfully downloaded primary record type list selected in the Download to Offline Client window. This setting is read-only.

- **Appointments and Tasks Downloaded.** This is the last successfully downloaded appointments and tasks setting selected in the Download to Offline Client window. This setting is read-only.

- **Enable Log.** Select True before you download or upload data in order to generate a log file for Customer Care.

NOTE: The following properties in the System Information page are read-only: Download Time, On Demand Server, Protocol, Offline Version, Build Version, Operating System, Excel Version, Proxy Server Login, Proxy Server Password, and Download Timeout.

4 Click Home to return to the Offline client.

About Administering the Offline Client

Company administrators can configure the Offline Client Edit Access setting for Oracle Offline On Demand (the Offline client) from the Company Profile page in Oracle CRM On Demand.

This setting determines when the edit access for records is verified for a user. The three options for the Offline Client Edit Access setting are as follows:

■ **Verify on Upload.** When records are uploaded from Oracle Offline On Demand to Oracle CRM On Demand, the edit access for a record is verified. This setting is recommended for optimal performance.

■ **Verify on Download.** When the record is edited, the edit access for a record is verified in Oracle Offline On Demand.

■ **None.** If this option is selected, Oracle CRM On Demand verifies the edit access in the same manner as the Verify on Download option.

For more information on the Company Profile page, see Setting Up Your Company Profile and Global Defaults.

Downloading Records to Your Offline Client

This topic describes how to download records to your Oracle Offline On Demand (the Offline client) and how to save your download settings in Oracle Offline On Demand.

Before you begin:

■ In Oracle CRM On Demand, set up the filtered lists that you want to use to restrict the account, contact or opportunity records that are downloaded to your computer. For instructions, see Working with Lists (on page 112).

■ You can download 250 accounts, 750 contacts, or 750 opportunities at one time. If your records exceed that number, Oracle CRM On Demand prompts you to reduce the number of records in your download request. Use filtered lists to reduce the number of records.

NOTE: Your company administrator can request an increase in the number of records available for download. However, increasing the number will increase the amount of time it takes to complete the download process.

■ Date and time are determined by regional settings on your computer. Within regional settings, it is possible to change the formatting of the default date and time. The separators for date and time cannot be the same. If they are the same, downloading records to Oracle Offline On Demand (the Offline client) fails. For example, you cannot use dashes to separate the day and month for dates and also to separate the hour and minute for time.

■ You must be connected to the Internet to download or upload your records.

Download the records that you want to use while working offline. The complete set of records that you can download consists of those you own, and those shared with you.

NOTE: Before you start downloading your records, configure your settings in Office 2007 to enable macros.

To download records

1   Open the Offline client.

2   Click the Download button.

3   When prompted to sign in to Oracle CRM On Demand, enter your user ID and password.

    NOTE: You must set up your security credentials properly for Oracle CRM On Demand, including the security questions. If you do not set up your security credentials, a Page Not Found error might be displayed.

4   Perform one of the following:

    ■   For Accounts, select which accounts you want to download from the list.

    ■   For Contacts, select which contacts list you want to download from the list.

    ■   For Opportunities, select which opportunities list you want to download from the list.

    NOTE: All the lists that you or your managers created for you appear in the primary record list in the Offline client.

5   If you want to download appointments and tasks associated with your primary record type, select the Tasks and Appointments that you want to download:

    ■   **My Default Appointments and Tasks.** These are the appointments and tasks from the past 60 days plus 6 months into the future where you are the owner, the delegated by user, or a user on the activity record.

    ■   **My Extended Appointments and Tasks.** These are the appointments and tasks from the previous year plus 6 months into the future where you are the owner, the delegated by user, or a user on the activity record.

    ■   **Default Appointments and Tasks.** These are the appointments and tasks from the past 60 days plus 6 months into the future.

    ■   **Extended Appointments and Tasks.** These are the appointments and tasks from the previous year plus 6 months into the future.

    ■   **Next 7 Days (plus past 60 days).** These are the appointments and tasks for the next 7 days plus the past 60 days.

    ■   **Next 14 Days (plus past 60 days).** These are the appointments and tasks for the next 14 days plus the past 60 days.

    ■   **Next 21 Days (plus past 60 days).** These are the appointments and tasks for the next 21 days plus the past 60 days.

    ■   **Next 31 Days (plus past 60 days).** These are the appointments and tasks for the next 31 days plus the past 60 days.

    ■   **Next 60 Days (plus past 60 days).** These are the appointments and tasks for the next 60 days plus the past 60 days.

    ■   **None.** No appointments or tasks are downloaded.

    NOTE: The selected Appointments and Tasks list filters secondary level activities only; that is, only those appointments and tasks directly related to your selected primary record type. Tertiary level

activities always download the default setting of all records 60 days prior to today and 6 months into the future.

NOTE: The lists for Tasks and Appointments are built into the product and you cannot change them.

6 Click Download.

Progress bars indicate how the three-step download process is progressing:

a Server request to retrieve data.

b Gathering of data for the Offline client.

c Processing the data within the Offline client.

When the process is complete, a message notifies you that your download has been successful.

TIP: To help you determine if any errors occurred during a download, enable error logging in Offline client. When it is enabled and if an error message appears, navigate to the Offline directory to check the error log file for the specific error message. For more information on enabling error logging, see Configuring the Offline Client (on page 880).

To save your download settings in the Oracle Offline On Demand

1 Open the Offline client.

2 Click Help, and then Information to open the System Information page.

3 Select True from the Save Download Settings menu.

This setting enables you to save the selected lists in subsequent downloads when using the Oracle Offline On Demand. It saves both the primary record list and the appointments and tasks setting values from the previous downloads.

Adding and Updating Records in Your Offline Client

You can add or update records in Oracle Offline On Demand (your Offline client), and later upload them to Oracle CRM On Demand.

Before you begin. Make sure the time zone on your laptop or desktop computer is set to the same one used in your Oracle CRM On Demand application. For information on viewing your time zone in Oracle CRM On Demand, see Updating Your Personal Details (on page 836).

Adding and updating records works the same way in your Offline client as it does in your company's Oracle CRM On Demand application.

■ You can add records from the Create box in the left Action bar or wherever you see a New button on a page.

■ You can update records wherever you see an Edit button or an Edit link.

If your company administrator has set the Offline Client Edit Access field to Verify On Upload, all records display an Edit button or link, and Oracle CRM On Demand verifies your edit access the next time that you upload records from the Offline client. For more information on the Offline Client Edit Access setting, see Setting Up Your Company Profile and Global Defaults.

If you do not have appropriate access to edit a record, Oracle CRM On Demand issues an error message stating that you do not have permission to modify all records. It also states that only some records were uploaded and instructs you to refer to the log file for more details. This error message provides a link to the automatically generated log file, which provides a list of the records that failed to upload, listed in order of transaction, and then in order of record. If you receive an error message, Oracle CRM On Demand continues to upload the records for which you have the appropriate access.

TIP: The Offline Status information on the left displays the number of changes that you make while working offline.

Related Topics
See the following topic for related information:

■ Uploading Records From Your Offline Client (on page 884)

Uploading Records From Your Offline Client

After you add or update records in Oracle Offline On Demand (your Offline client), you upload the new information to your company's Oracle CRM On Demand application.

NOTE: When you want to delete records, delete them in Oracle CRM On Demand. Do not delete records in the Offline client. Also, if you want to transfer the ownership of an account from yourself to another employee, upload the account to Oracle CRM On Demand first, and then change the owner in Oracle CRM On Demand.

Before you begin. You must be connected to the Internet to upload your records.

To upload records

1 In the Offline client, click the Upload button.

2 Sign in to Oracle CRM On Demand.

   A progress bar appears, followed by a message notifying you of a successful upload. If you receive an error message, the uploading process continues but ignores the records with the conflicting changes.

3 When the upload is completed, you are prompted to perform a download.

   NOTE: You must download a new data set; otherwise, your Offline client will be set to read-only.

4 Click Yes and continue with the download.

Related Topics

See the following topic for related information:

■ Adding and Updating Records in Your Offline Client (on page 883)

■ About Conflict Resolution with the Offline Client (on page 885)

About Conflict Resolution with the Offline Client

Conflicts occur at the field level when the same field in the same record has been updated in Oracle CRM On Demand and in Oracle Offline On Demand (the Offline client). For example, another employee might update an email address in Oracle CRM On Demand while you updated the same email address in the Offline client. This conflict is recognised during the synchronisation.

By default, the field change in Oracle CRM On Demand wins the conflict resolution. However, if an error cannot be resolved by this rule, you need to address each issue manually. To review the errors, open the UploadError file in the Offline On Demand directory or print it.

The errors are saved to a log file, which is in the same directory as the Offline client. The format of the log file name (UploadErrorYYYY-MM-DD.html) indicates the date on which the changes were made, for example, UploadErrors2009-10-22.html.

TIP: To correct the errors, print the log file, and make your changes in Oracle CRM On Demand.

Adding Emails from Microsoft Outlook and Lotus Notes

Oracle Outlook Email Integration On Demand (the Outlook Email Integration client) and Oracle Notes Email Integration On Demand (the Notes Email Integration client) are modules that allow you to add emails from Microsoft Outlook and from Lotus Notes to Oracle CRM On Demand. Those emails become a history of all your account interactions, and are available to the entire sales team.

When you add emails to the application (either previously received or outgoing emails), you can:

■ Add the email as a task record (a completed activity) linked to Account, Contact, Lead, Opportunity, or Service records in Oracle CRM On Demand

■ Add the email recipients as Contacts, Leads, Opportunities, or Service Requests to Oracle CRM On Demand

■ Create follow-up tasks or appointments from the emails in Oracle CRM On Demand

■ Update Oracle CRM On Demand records directly from Outlook or Notes, including new email addresses

■ Search Oracle CRM On Demand to find addressee information (the Outlook Email Integration client only)

To use the Outlook Email Integration client or the Notes Email Integration client, install it on your laptop or desktop computer.

NOTE: To use the Outlook Email Integration client or the Notes Email Integration client, you must have the Outlook/Notes Email Integration Access privilege in your user role.

Installing Oracle Outlook Email Integration On Demand

To install the Outlook Email Integration client, you download and run a set-up program that runs an InstallShield wizard. The wizard creates an Outlook plug-in that adds the following icons or labels to the Outlook toolbar:

- Add to CRM On Demand. This appears in the Inbox toolbar.

- Send & Add to CRM On Demand. This appears in the Message window toolbar.

- CRM On Demand Find. This icon appears in the Message window toolbar.

Before you begin the Outlook Email Integration client installation:

- Make sure your computer meets the system requirements specified for Oracle Outlook Email Integration On Demand in Oracle CRM On Demand. For information on how to check the system requirements, see Oracle CRM On Demand Web site
http://crmondemand.oracle.com/en/products/system-requirements/index.html.

- If you are using Microsoft Outlook 2003, make sure Microsoft Word is not selected as your email editor. To verify this, click Tools in the Outlook menu bar and select Options. Under the Mail Format tab, deselect the checkbox for this field: Use Microsoft Word to edit email messages.

To install the Outlook Email Integration client

1   Exit Microsoft Outlook, and close all its open windows.

2   Sign in to Oracle CRM On Demand.

3   Click the My Set-up link at the top of any page.

4   On the Personal Homepage, click the Data & Integration Tools link.

5   On the Data &Integration Tools page, click the Oracle Outlook Email Integration On Demand link.

6   On the Oracle Outlook Email Integration On Demand page, read the information, and then click the Download Oracle Outlook Email Integration On Demand link.

7   On the second Oracle Outlook Email Integration On Demand page, read the additional information and click the Download Oracle Outlook Email Integration On Demand link.

8   In the window, you can:

- Click Save to copy the Oracle_OEI_OnDemand.exe file to your hard drive to install while you are offline. (Recommended)

- Click Run to begin the installation. You need to stay connected to the Internet to continue with the installation.

9   Follow the instructions to complete the installation.

Installing Oracle Notes Email Integration On Demand

Integrating Lotus Notes Email with Oracle CRM On Demand is a two-step process:

■ Modifying the Lotus Notes Template

■ Installing the Notes Email Integration client on the user's computer

Modifying the Lotus Notes Template

The Lotus Notes template is modified at the corporate level by your Lotus Notes administrator to expose the necessary code and UI elements that provide the interface with the Notes Email Integration client.

The following procedure describes how to download the Oracle Notes Email Integration On Demand files.

To download the Oracle Notes Email Integration On Demand files

1 Click the Training and Support link in the upper-right corner of any page, and sign in to My Oracle Support.

If you already have an Oracle.com account, you can sign in to My Oracle Support without registering. If you do not have an Oracle.com account, you must register as a new user.

2 In the My Oracle Support page, click the Downloads link, and then click the link to download the Oracle Notes Email Integration On Demand files for the appropriate version of Oracle CRM On Demand.

Installing the Notes Email Integration Client

To install the Notes Email Integration client, you run a set-up program that runs an InstallShield wizard. The wizard installs and registers the Notes Email Integration client that adds the following buttons to the folder and memo views in Lotus Notes:

■ Add to Oracle CRM On Demand. This button appears in the Inbox and Sent Items folder views.

■ Send & Add to Oracle CRM On Demand. This button appears in the New Memo and Reply Memo views.

Before you begin the Notes Email Integration client installation:

■ Notes Email Integration client uses a routing server to dynamically retrieve a user's instance URL. Ensure that you have a router set up to work with your Notes Email Integration client installation. For more information, contact Customer Care.

■ Check with your Oracle CRM On Demand administrator to see if the Notes Email Integration client has been enabled at your company. Your company's Lotus Notes administrator must make modifications to your company's corporate Lotus Notes template to enable the Notes Email Integration client before it will work.

CAUTION: Do not attempt to install the Notes Email Integration client until you are sure that it has been enabled at your company. Doing so will require the Notes Email Integration client to be uninstalled and reinstalled before it will work.

■ To download the installation package for the Notes Email Integration client, click the Training and Support link in the upper-right corner of any page to open the Training and Support Centre page. On that page, click the Knowledge and Training link, and then sign in to My Oracle Support. In the My Oracle Support page, click the Downloads link, and then download the installation package.

■ Make sure your computer meets the system requirements specified for Oracle Notes Email Integration On Demand in Oracle CRM On Demand. For information on how to check the system requirements, see Oracle CRM On Demand Web site http://crmondemand.oracle.com/en/products/system-requirements/index.html.

To install the Notes Email Integration client

1 Exit Lotus Notes and close all of its windows.

2 Obtain the Notes Email Integration client installation file from your Oracle CRM On Demand administrator, and save it to your desktop.

3 From your desktop, run the installation file, and then follow the instructions to complete the installation.

Uninstalling Oracle Outlook Email Integration On Demand or Oracle Notes Email Integration On Demand

You can uninstall Oracle Outlook Email Integration On Demand or Oracle Notes Email Integration On Demand at any time, using the Microsoft Windows Add/Remove Programs utility.

Adding Email Information to Oracle CRM On Demand

When adding email to Oracle CRM On Demand, the combined file size for the email and attachment cannot exceed 5 megabytes (MB). Oracle Outlook Email Integration On Demand and Oracle Notes Email Integration On Demand do not support compressed files as attachments, for example, .zip, .rar, .7z, .cab and so on.

NOTE: When opening or creating emails in Outlook 2007, CRM On Demand buttons appear on the ribbon in the CRM On Demand Group on the Message tab.

To add email information

1 Highlight or open the email that you want to add to Oracle CRM On Demand.

2 In Microsoft Outlook, click Add to CRM On Demand. In Lotus Notes, click Add to Oracle.

3 In the Sign In window, enter the email address and password you normally use to access Oracle CRM On Demand.

NOTE: You only need to sign in once for each Outlook or Notes session; you do not have to log in again until you close Outlook or Notes. Data that is sent to and from Oracle CRM On Demand from the Outlook Email Integration client or the Notes Email Integration client is always encrypted for security.

4 To automatically link emails during this session with the contact names in the To, Cc and From fields, select Yes for Automatic Association.

When using Automatic Association, the application searches the emails in Oracle CRM On Demand and automatically adds this email as a completed task. If no match is found, the window appears for you to manually search and link the email to records.

5 Click the Sign In button.

The application searches records in Oracle CRM On Demand and displays the results in the Create a Task window, as described in the following table.

This area	Contains these records
Selected Records	Initially, this area shows the contact records whose email addresses in Oracle CRM On Demand match the ones in the To, Cc, and From fields in the emails. You can move records from other areas in this window to the Selected Records. When you click Save in this window, the application saves the email to all the records in this area and to account records linked to them. **NOTE:** A contact must have a linked account record for this email to be saved to it.
Email Recipients Not Found	This area shows the names appearing in the To or Cc fields in the email that cannot be mapped to existing contacts in Oracle CRM On Demand.
Related Records	This area shows the records in Oracle CRM On Demand that are linked to the contact records corresponding to the email recipients, for example, Opportunities.

6 From the Create a Task window, you can perform the following:

To do this	Follow these steps
Add follow-up tasks or appointments to Oracle CRM On Demand	1 In the Options After Saving area, select the Create a New Task or Create a New Appointment checkbox. 2 Click Save. 3 In the New Task or New Appointment form, update the information and save the record.
Add a new opportunity or service request linked to an email recipient	1 In the Selected Records area, right-click on the email recipient name. 2 Select Add New Opportunity to On Demand or Add New Service Request to On Demand. 3 Update the information in the New Opportunity or New Service Request form. 4 Click Save.
Add the email recipient as a contact or lead	1 In the Email Recipients Not Found area, right-click on the email recipient name. 2 Select Add to On Demand (for a new contact

	record) or Add New Lead to On Demand (for a new lead record).
	3 Update the information in the New Contact or New Lead form.
	4 Click Save.
	The email recipient's name moves to the Selected Records area in the window.
Add this email as a completed task	**1** Make sure that a record appears in the Selected Records area.
	2 Click Save.
	The email is saved as a completed task linked to each record in the Selected Records area along with accounts linked to these records. The default values shown in the Activity Details are used unless you update them.
Link this email to another record	**1** In the Create a Task window, double-click on any found records to move them to the Selected Records area.
	2 (Optional) Update the default settings in the Activity Details area.
	3 Click Save.
	This email is saved as a task linked to the selected records with the values shown in the Activity Details area.
Remove the record from the Selected Records area	■ Double-click the record. It moves to the left side of the window so that it won't be linked to this email.
Search Oracle CRM On Demand for additional contacts, accounts, opportunities, leads, or service requests	**1** In the Search drop-down list, select the record type.
	2 Enter the name for which you want to search.
	3 Click Submit.
	Records matching the name appear in the Search Results area.
Update a record	**1** Right-click on the record.

	2	Select Edit.
	3	Update the information in the Edit form.
	4	Click Save.
Update an email address in Oracle CRM On Demand from this email	**1**	In the Search Results area, right-click on the record.
	2	Select Associate email address.
	3	In the Associate Contact with Recipient window, select the updated email address from the drop-down list.
	4	Click Save. The new email address appears in the contact record.
View record information, such as the record name, email address and related record names	■	Move your mouse over the record and keep it there until the tool tip appears, showing this information.

To send an email and add the email to Oracle CRM On Demand

1 In Microsoft Outlook, click New in the toolbar. In Lotus Notes, click the New Memo or Reply button.

2 (Optional) Add email recipients from the Oracle CRM On Demand Contacts records:

    a In the Message window, enter a name in the CRM On Demand Find field.

    b Press Enter.

        A window displays the contacts found in Oracle CRM On Demand.

    c Select one of these options: To, CC or BCC.

    d Click Select.

    NOTE: If you enter an email address longer than 100 characters, then the Outlook Email Integration client ignores that email address and the task is not added to Oracle CRM On Demand.

3 Enter additional information as you would normally when sending an email.

    NOTE: When using Oracle Outlook Email Integration On Demand, you must upload images as an attachment to an email. If you embed an image within an email with this integration, then the image is excluded from the email.

4 Perform one of the following:

    ■ In Microsoft Outlook, click Send &Add to CRM On Demand.

■ In Lotus Notes, click Send & Add to Oracle.

When you click Save, the email is sent to the recipients you selected, and the email is saved according to the information in the Create a Task window.

Using Oracle CRM On Demand Integration for Office

Oracle CRM On Demand Integration for Office is comprised of the following downloadable template files:

■ Mail Merge for Word

■ Reports and Analysis for Excel

■ Segmentation Wizard

These template files insert special toolbars into Microsoft Word and Microsoft Excel. Using these toolbars, you can manipulate Oracle CRM On Demand data in Microsoft Word or Excel to create direct mail, mass email, refreshable offline reports, and lists of contacts (called segments) for use in marketing campaigns.

The following sections describe how to use the Oracle CRM On Demand Integration for Office templates:

■ Using Mail Merge for Word (on page 892). Describes the On Demand Integration toolbar in Microsoft Word, provides information about opening Mail Merge for Word templates properly, and explains how to create a direct mailing or mass email in Microsoft Word using data from Oracle CRM On Demand.

■ Using Reports and Analysis for Excel (on page 897). Describes the On Demand Integration toolbar in Microsoft Excel, provides background information about creating reports using the Reports and Analysis for Excel template, and describes how to run existing reports and create new reports using the Reports and Analysis for Excel template.

■ Using Segmentation Wizard (on page 901). Describes the Target Builder toolbar in Microsoft Excel, provides background information about segment types, and describes how to create, upload, and export segments.

NOTE: To use Oracle CRM On Demand Integration for Office, your administrator must have enabled Web Services in Oracle CRM On Demand.

NOTE: Networks that leverage authenticated proxies are not supported.

Using Mail Merge for Word

Using Mail Merge for Word, you can download your Oracle CRM On Demand data into Microsoft Word to create a direct mailing or mass email. Before doing so, you must set up your Mail Merge for Word templates.

Click a topic to see step-by-step procedures to do the following:

■ Downloading the Mail Merge for Word Template (on page 894)

■ Creating Mail Merge for Word Templates (on page 894)

■ Creating Direct Mailings or Mass Emails with Mail Merge for Word (on page 895)

Related Topics

See the following topic for related information:

- About the On Demand Integration Toolbar in Mail Merge for Word (on page 893)

About the On Demand Integration Toolbar in Mail Merge for Word

Mail Merge for Word contains the On Demand Integration toolbar, which is used to create mail merges with Oracle CRM On Demand data.

NOTE: If you are using Microsoft Office 2007, the On Demand Integration toolbar is available in the Add-Ins tab. Click the Add-Ins tab to display all the On Demand Integration options.

The following table describes the options available in the On Demand Integration toolbar in Mail Merge for Word.

Toolbar Option	Description
1. Get On Demand Data	Allows you to sign in to Oracle CRM On Demand and download data to Microsoft Word. The options are: Contacts, Leads, Accounts, Opportunities, Service Requests, and Use Saved List. Choosing Use Saved List allows you to select an existing data source stored as a list on your machine.
2. Refine Recipients	Allows you to choose which recipients from the downloaded data you want to correspond with.
3. Refine Message	Contains the following options: - **AutoText.** Allows you to insert predetermined fields into the message. For example, you can insert a closing line into each message using the AutoText option. - **Insert Oracle Field.** Allows you to insert fields from the Oracle CRM On Demand record into the message. For example, you may choose to insert Full_Name into the greeting of each message.
4. Preview	Allows you to preview each message. You can use the arrows to scroll through each one.
5. Print or Send Message	Allows you to merge the data into the template and print, merge into a separate Word document, or merge into individually addressed email messages and send them out.
6. Log as On Demand Activity	Allows you to create an activity in Oracle CRM On Demand as a record of the correspondence. This single activity is associated with each of the message's recipients. The text of the template sent is automatically inserted into the description of this activity.

Downloading the Mail Merge for Word Template

The Mail Merge for Word template adds the On Demand Integration toolbar to Microsoft Word. The following procedure describes how to download the template.

To download the Mail Merge for Word template

1   Click the Training and Support link at the top of Oracle CRM On Demand, and sign in to My Oracle Support.

    If you already have an Oracle.com account, you can sign in to My Oracle Support without registering. If you do not have an Oracle.com account, you must register as a new user.

2   In the My Oracle Support Knowledge page, click the Downloads link, and then click the link to download Oracle Mail Merge for Word template.

3   Follow the instructions provided on the Web page to download the template.

Creating Mail Merge for Word Templates

The Mail Merge for Word toolbar (the On Demand Integration toolbar) is attached to each template file. The following procedure describes how to create a Mail Merge for Word template, using the On Demand Integration toolbar. Using the toolbar to create Mail Merge for Word templates allows you to make sure that your Oracle CRM On Demand data will support the personalisation you are embedding in the template.

About Opening Mail Merge for Word Templates

To make sure that Mail Merge for Word is attached to any templates that you create or modify, you must always open the original template files. To make sure you have opened the original template file, check the title bar. The document title must have a .dot file name extension.

NOTE: Do not double-click the file to open it, because this action opens a new Word document, based on the template file. If you save any changes while in this mode, you will be saving a normal Word document, which does not have the On Demand Integration toolbar attached.

To create or modify Mail Merge for Word templates

1   Right-click the Mail Merge for Word template that you downloaded and saved locally, and select Open.

    The file opens in Microsoft Word.

2   Create a typical correspondence using the On Demand Integration toolbar and Word functionality.

    You can refine recipients, insert Oracle CRM On Demand fields, preview, and so on. For specific details about how to create a correspondence using the toolbar, see Creating Direct Mailings or Mass Emails with Mail Merge for Word (on page 895).

3   Before saving the template, unlink the data source from the template as follows:

a   Click the Main document setup button on the Microsoft Word Mail Merge toolbar.

b   In the Main Document Type dialog box, select the Normal Word document radio button.

NOTE: If the Microsoft Word Mail Merge toolbar is not visible, access it by clicking View, Toolbars, and then Mail Merge in the Word menu bar. If you are using Microsoft Office 2007, click the Mailings tab, then Start Mail Merge.

CAUTION: If you save and publish a template before disconnecting the data source, the file will attempt to connect to a data source on the local machine when it is used.

4   Do one of the following:

- If you are saving a new template, select File, then Save As.

- If you are saving changes to an existing template, select File, then Save.

Creating Direct Mailings or Mass Emails with Mail Merge for Word

Using Mail Merge for Word, you can download Oracle CRM On Demand data, and merge it with a Word document. The following procedure uses Contacts as an example, but you can also create mail merges using Oracle CRM On Demand data from Leads, Accounts, Opportunities, and Service Requests or using a recipient list you have saved locally.

NOTE: The maximum number of records that can be downloaded is 4000.

To create a direct mailing or mass email using Mail Merge for Word

1   Open the Word template file you want to use for your direct mailing.

2   In the On Demand Integration toolbar, click Get On Demand Data, then Contacts.

3   In the Oracle On Demand - Sign-in dialog box, complete the appropriate fields and click Sign In to sign in to Oracle CRM On Demand.

4   In the Define List dialog box, do the following:

a   In the Filters tab, define the criteria for the data you want to download into Word.

For more information about creating filters, see Working with Lists (on page 112).

b   In the Fields tab, select the specific fields of information you want to download. A maximum of 40 fields can be selected.

The system will scan the current template and automatically select each of the fields that are needed. You can select additional fields to insert into the template to further personalise the communication.

> **NOTE:** You should also select additional fields of information that may be required to send the communication. For example, if you are going to be sending a mass email, you must include the email address in the recipient file.

   c Click OK.

5 In the Save List? dialog box, do one of the following:

   a To save the list locally for later use, click Yes. In the Save As dialog box, complete the appropriate fields, and then click Save.

   b If you plan on using the list only once, click No and then click OK. Selecting this option automatically saves the recipient list as a temporary file which will be deleted after use.

6 In the Mail Merge Recipients dialog box, you can do the following:

- Clear check boxes to remove recipients from this correspondence.

- Select check boxes to include recipients in this correspondence.

When you have finished editing recipients, click OK.

> **NOTE:** You can reopen the Mail Merge Recipients dialog box by clicking Refine Recipients in the On Demand Integration toolbar.

7 Click Refine Message to insert Oracle CRM On Demand fields or auto-text into the Word document. For more information about the Refine Message button, see Using Mail Merge for Word (on page 892).

8 Click Preview and use the arrow buttons to scroll through each message to see how they will appear when printed or sent by email.

For more information about the Preview button, see About the On Demand Integration Toolbar in Mail Merge for Word (on page 893).

9 Click Print or Send Message and then do one of the following:

   a To send to another Word document, select Merge to Document.

   b To print, select Merge to Printer.

   c To distribute as a mass email, select Send as Email.

   d To distribute as a mass fax, select Send as Fax.

> **NOTE:** To distribute correspondence as a mass fax, you must first configure Microsoft Office. For more information, search for "fax" in your Microsoft Office help files.

10 (Optional) Click Log as On Demand Activity to create a single Oracle CRM On Demand activity that will be associated with every contact selected for the mail merge. The Description field of the activity is automatically populated with the text of the template. In the Tasks dialog box, complete the appropriate fields, and then click Save.

Using Reports and Analysis for Excel

Using Reports and Analysis for Excel, you can download Oracle CRM On Demand data into Microsoft Excel, and work with it to create reports. This section includes the following topics:

- About the On Demand Integration Toolbar in Reports and Analysis for Excel   (on page 897)
- About Creating Reports with Reports and Analysis for Excel (on page 897)
- Downloading the Reports and Analysis for Excel Template (on page 898)
- Creating Reports Using Reports and Analysis for Excel (on page 898)

About the On Demand Integration Toolbar in Reports and Analysis for Excel

Reports and Analysis for Excel contains the On Demand Integration toolbar, which you can use to create reports using data from Oracle CRM On Demand.

NOTE: If you are using Office 2007, the On Demand Integration toolbar is available in the Add-Ins tab. Click the Add-Ins tab to display all the On Demand Integration options.

The following table describes the On Demand Integration toolbar in Reports and Analysis for Excel.

Toolbar Option	Description
Configure On Demand Report	Allows you to sign in to Oracle CRM On Demand and download data to Excel.
Refresh On Demand Report	Updates data you are viewing in Excel with the most recent data available from Oracle CRM On Demand.

About Creating Reports with Reports and Analysis for Excel

Using Reports and Analysis for Excel, you can download Oracle CRM On Demand data and manipulate it in Microsoft Excel. When you click Configure On Demand Report on the On Demand Integration toolbar in Reports and Analysis for Excel, the Configure Reports dialog box appears. Using the Configure Reports dialog box, you can edit existing reports, create new reports, or remove existing reports. The following table describes the options available in the Configure Reports dialog box.

Button	Comments
Edit Report	Click to modify the filter settings and fields included in the selected report.

Button	Comments
New Report	Click to create a custom report for the selected record type. You can set filter criteria against each of the standard and custom fields for that record type. For information about setting filter criteria in lists, see Working with Lists (on page 112).
Remove Report	Click to remove a report from the Excel workbook.
Run Report	Click to run the currently selected report. After running, the report is added as a new worksheet to the workbook.
Exit	Click to exit the Configure Reports dialog box.

Downloading the Reports and Analysis for Excel Template

The Reports and Analysis for Excel template adds the Oracle CRM On Demand Integration toolbar to Microsoft Excel. The following procedure describes how to download the template.

To download the Reports and Analysis for Excel template

1 Click the Training and Support link at the top of Oracle CRM On Demand.

2 Click the Support tab.

3 Click My Oracle Support Login.

4 Click Sign In and then enter your sign in credentials.

5 In the Search Knowledge Base field, enter 433624.1, and start the search.

6 Click the link for Oracle Reports and Analysis for Excel Template.

7 Follow the instructions provided on the Web page to download the template (ZIP file).

8 Decompress the ZIP file to a local directory.

Creating Reports Using Reports and Analysis for Excel

This section contains the following topics:

■ Running Existing Reports

■ Creating New Reports

Running Existing Reports

The following procedure describes how to run an existing report using Reports and Analysis for Excel. It also includes an optional step that describes how to edit an existing report. After running the report, you can work with the data in your workbook. You can build pivot tables, pivot charts, charts and graphs, and calculate fields from information included in your report worksheets.

NOTE: When adding pivot tables, pivot charts, and graphs and charts you should create them in new worksheets, otherwise when you refresh your reports they could be overwritten.

To run existing reports

1 Open the Excel template file.

2 In the On Demand Integration toolbar, click Configure On Demand Report.

3 In the CRM On Demand - Sign-in dialog box, complete the appropriate fields, and click Sign In to sign in to Oracle CRM On Demand.

4 In the Configure Reports dialog box, from the Select Record Type drop-down list, select the record type you want for your report. Choices are:

   ■ Account

   ■ Contact

   ■ Opportunity

   ■ Lead

   ■ Service Request

   ■ Solution

   ■ Household

   ■ Custom Object 1

   ■ Custom Object 2

   ■ Campaign Recipients

   ■ Custom Object 1 Accounts

   ■ Custom Object 1 Opportunities

   ■ Custom Object 2 Accounts

   ■ Custom Object 2 Opportunities

   The available reports for the selected record type appear in the Available Reports list. You can edit an existing report, remove an existing report, or create new reports. For more information about the Configure Reports dialog box, see About Creating Reports with Reports and Analysis for Excel (on page 897). For more information about creating new reports, see Creating New Reports in this topic.

5 Select an existing report from the Available Reports list.

6 (Optional) Click Edit Report to modify the filter settings and fields included with the currently selected report.

    a In the Define Report dialog box, in the Filters tab, define the criteria for the data you want to download.

       For more information about creating filters, see Working with Lists (on page 112).

    b In the Fields tab, select the specific fields of information to be downloaded and then click OK.

       NOTE: You can select up to 100 Fields for inclusion in a report.

7 Click Run Report.

    The requested data is inserted into the Excel workbook as a new worksheet labelled with the report name.

8 Click Exit in the Configure Reports dialog box to begin editing the data in Excel.

9 Click Refresh On Demand Report to update the data that you are editing in Microsoft Excel with the most recent data from Oracle CRM On Demand.

    NOTE: When you click Refresh On Demand Report, each report worksheet in the workbook is overwritten with the most recent information from Oracle CRM On Demand.

Creating New Reports

The following procedure describes how to create and run a new report using Reports and Analysis for Excel.

To create new reports

1 Open the Excel template file you want to use to create your report.

2 In the On Demand Integration toolbar, click Configure On Demand Report.

3 In the CRM On Demand - Sign-in dialog box, complete the appropriate fields, and click Sign In to sign in to Oracle CRM On Demand.

4 In the Configure Reports dialog box, from the Select Record Type drop-down list, select the record type you want to use for your report. Choices are: Account, Contact, Lead, Opportunity, Service Request, or Solution.

    The available reports for the selected record type appear in the Available Reports list.

5 Click New Report to create your own query.

    NOTE: Creating a new report allows you to create a custom report for a selected record type. You can set filter criteria against each of the standard and custom fields for that record type.

6 In the Define Report dialog box, do the following:

    a In the Filters tab, define the criteria for the data you want to download.

For more information about creating filters, see Working with Lists (on page 112).

b In the Fields tab, select the specific fields of information to be downloaded and then click OK.

NOTE: You can select up to 100 Fields for inclusion in a report.

7 In the Save Reports dialog box, enter a name for this report in the Report Name field for future use, and then click Save.

8 In the Configure Reports dialog box, select the report you just created and click Run Report.

The report you created appears as a worksheet in Excel labelled with the name you indicated.

9 After adding all the reports you need, click Exit to close the Configure Reports dialog box and begin to work with the data in your worksheet.

10 Click Refresh On Demand Report to update the data that you are editing in Microsoft Excel with the most recent data from Oracle CRM On Demand.

Clicking Refresh On Demand Report updates every report worksheet in the workbook.

Using Segmentation Wizard

Using Segmentation Wizard, you can define contact segments, based on multiple record types. A segment is a list of contacts from Oracle CRM On Demand. This section includes the following topics:

- About the Target Builder Toolbar in Segmentation Wizard (on page 901)
- About Segmentation Wizard (on page 902)
- Downloading Segmentation Wizard (on page 903)
- Creating Segments (on page 903)
- Uploading Segments (on page 905)
- Exporting Segments (on page 906)

About the Target Builder Toolbar in Segmentation Wizard

Segmentation Wizard contains the Target Builder toolbar, which is used to create contact segments using data from Oracle CRM On Demand.

The following table describes the Target Builder toolbar in Segmentation Wizard.

Toolbar Option	Description
Manage Segments	Allows you to create and update segments using data from Oracle CRM On Demand, and to export segments as CSV files.

Toolbar Option	Description
Refresh Segment	Updates the data that you are viewing in Microsoft Excel with the most recent data available from Oracle CRM On Demand.
Upload Segments	Uploads the list of segments from Segmentation Wizard to Oracle CRM On Demand.

About Segmentation Wizard

You can use Segmentation Wizard to generate contact segments (that is, lists of contacts) based on a combination of account, contact, opportunity, and service request fields in Oracle CRM On Demand. The resulting segments are multidimensional customer lists for targeting campaigns.

You can create the following segment types:

- **Dynamic segment.** Dynamic segments can be refreshed whenever necessary. When you refresh a dynamic segment, the filters saved with the segment are reapplied to the records in Oracle CRM On Demand, and the segment is updated to include new records. The new segment overwrites the previous segment.

- **Static segment.** Static segments are preserved as a snapshot. With a static segment, you can also manually select the contacts to include in the list. You cannot refresh a static segment.

- **External segment.** External segments are based on data from an external system or source. Segmentation Wizard finds Oracle CRM On Demand records that match the external list of data and returns linked contacts.

Additionally, Segmentation Wizard allows you to:

- Upload segments as campaign recipients to Oracle CRM On Demand

- Export segments as CSV files

Scenario for Using Segmentation Wizard

Your marketing team is planning to hold a marketing event in Germany for executives in the automotive sector. The event will allow executives at your company to assist in closing large, active opportunities before the end of the quarter.

To generate a segment to support this business need, you apply these filters:

- Contact Job Title is set to President.

- Account Location is set to Germany.

- Account Industry is set to Automotive.

- Opportunity Sales Stage is set to Negotiation Opportunity.

- Revenue is greater than €1,000,000.

The resulting segment is a list of contacts in Oracle CRM On Demand that meet all the criteria that you defined.

For example, to be included in the list, a contact record must (in addition to having the job title of President) be linked to account and opportunity records that meet the criteria for those record types.

Downloading Segmentation Wizard

Segmentation Wizard contains the Target Builder toolbar, which is used to create contact segments using data from Oracle CRM On Demand. The following procedure describes how to download Segmentation Wizard (an Excel file).

To download Segmentation Wizard

1 Click the Training and Support link at the top of Oracle CRM On Demand, and sign in to My Oracle Support.

  If you already have an Oracle.com account, you can sign in to My Oracle Support without registering. If you do not have an Oracle.com account, you must register as a new user before you sign in.

2 In the Support tab, click Add-On Applications.

3 In the Add-On Applications page, click Segmentation Wizard.

4 Follow the instructions provided on the Web page to download the file.

5 Save the file to a local directory.

Creating Segments

When you create a segment, you first specify the type of segment that you want to create. Then, you set up filters to define the segment, enter a name for the segment, and generate the segment from Oracle CRM On Demand records.

The following procedure describes how to create a segment.

Before you begin. Make sure the filter values that you enter match those in the records you want to include in your segment. For more information on filtering lists in Oracle CRM On Demand, see Working with Lists (on page 112).

NOTE: The Segmentation Wizard does not support multiselect picklist fields.

To create a segment

1 Open the Segmentation Wizard (Excel) template file.

2 In the Target Builder toolbar, click Manage Segments.

3 If prompted, select any options to enable macros.

4 If prompted, sign in using your Oracle CRM On Demand email address and password.

5 In the Manage Segments window, click New.

6 In the New Segment window, select the type of segment:

■ **Dynamic.** Allows you to save the criteria for the segment, and refresh the segment with the latest information from Oracle CRM On Demand.

■ **Static.** Allows you to initially filter a list of contacts, and then selectively choose which contacts to include in the segment.

■ **External.** Allows you to use an external list of data (external CSV file) to retrieve a list of contacts from Oracle CRM On Demand. This segment type allows you to base your segments on a third-party file that you might have purchased or extracted from other internal data systems.

Segmentation Wizard generates the segment by matching records in Oracle CRM On Demand with the records in your CSV file. You can specify the fields that you want to use when matching records.

7 (Dynamic or Static segments types only) Set up the filters to apply to the different record types in the Set Segment Filters window.

NOTE: Filter values for numeric fields must be entered without using separators for thousands, and must use a period (.) as the decimal separator. For example, enter 1000.50 for one thousand and fifty cents in a U.S. currency field.

a Click the tab corresponding to the record type for the first filter.

When setting filters on any record type, contacts that are linked to records meeting those criteria are included in the segment.

b Select the Field, Condition, and Filter Value to define the first filter.

c Repeat Step a and Step b until you have defined all your filters for this segment.

d Click Save Segment.

8 (External segment types only) Set up the segment as follows:

a In the External List window, specify the type of records that the external list contains, and specify if you want to apply additional contact filters.

b In the Find External List window, select the CSV file.

c In the External List window, select the fields that you want Segmentation Wizard to use to determine matches between the CSV file and the Oracle CRM On Demand fields, then map the fields from your CSV file to the corresponding Oracle CRM On Demand fields, and click Save.

9 In the Save Segment window, enter a name for the segment, and click Save.

Segmentation Wizard generates a contact list of records that meets all the criteria you set up. The list appears in a newly created worksheet with the label you used as your segment name.

NOTE: When Segmentation Wizard generates the segment, it returns only those records that you have access to in Oracle CRM On Demand.

10 (Optional, Static segments only) Select or clear contacts in the List Members window, and click Save.

The following procedure describes how to refresh a dynamic segment.

NOTE: When you refresh a dynamic segment, the segment is overwritten and cannot be restored.

To refresh a dynamic segment

1 Open the Segmentation Wizard (Excel) template file.

2 In the Target Builder toolbar, click Refresh Segment.

3 In the Refresh Dynamic Segments window, select the segment.

4 Click Refresh.

The following procedure describes how to update a dynamic or static segment.

To update a dynamic or static segment

1 Open the Segmentation Wizard (Excel) template file.

2 In the Target Builder toolbar, click Manage Segments.

3 Select the dynamic or static segment that you want to update.

4 Click Edit.

5 Do one of the following:

- For Static Segments, select or clear contacts in the Select Segment Members window.

- For Dynamic Segments, update the filters.

6 Click Save.

Segmentation Wizard generates the segment using the newly defined criteria.

Uploading Segments

You can upload the segments that you create in Segmentation Wizard to Oracle CRM On Demand. When you upload a segment, Oracle CRM On Demand links the contacts in the list to a campaign in Oracle CRM On Demand. The contacts appear in the Recipients section on the Campaign Detail page.

The following procedure describes how to upload a segment to Oracle CRM On Demand.

Before you begin. In Oracle CRM On Demand, create the campaign that you want to link to the segment.

To upload a segment

1 Open the Segmentation Wizard (Excel) template file.

2 In the Target Builder toolbar, click Upload Segments.

3 In the Upload Segments window:

 a Select the segments that you want to upload.

 b Select the campaign for this segment.

 c Select the delivery status for the recipients that you are uploading.

 The value that you select appears in the Delivery Status column in the Recipients section on the Campaign Detail page.

 d Click Upload.

 NOTE: You can upload a total of 10,000 recipients to a single campaign.

Exporting Segments

You can export a segment as a CSV file, which you can then distribute to third parties. The following procedure describes how to export segments.

To export a segment

1 Open the Segmentation Wizard (Excel) template file.

2 In the Target Builder toolbar, click Manage Segments.

3 In the Manage Segments window, select the segment that you want to export, and click Export.

4 Move the fields that you want to include to the Selected Fields area, arrange them in the order you want, and then click Export.

5 In the Save As window, name the file, and save it to the location that you want.

15 Reports

Use the Reports Homepage to create and display reports and charts about your business data. The Reports Homepage shows a catalogue of the available reports. It provides a starting point for running, printing, and saving reports. If your role includes the Manage Custom Reports privilege, you can also create custom reports from this page and make them available to the employees at your company.

To change your visibility in relation to different records or different books, use the Book selector. For more information about visibility in relation to records and what records are available to you, see About Visibility to Records in Analytics (on page 908).

NOTE: Changes made to your Default Language, Currency, and Country fields on the Personal Profile pages are not reflected in all reports and analytics until you sign out and sign in again. Also, depending on your company's default language, you might see certain items in reports in a language other than your personal, default language. Even though any change made to your time zone is not reflected in reports, a different set of values is initialised for the session variables that depend on your time zone value when you log in next time.

NOTE: The changes that you make to your Personal Profile page take effect after you sign out and sign in again. The changes made to the company-level settings (such as Default Language, Currency, and so on) do not take effect until a full extract, transform, and load (ETL) is performed. To request a full ETL, contact Customer Care.

Note for first-time users: Some reports are updated nightly, so you might not see data in reports for the first 24-hour period after signing in. For example, the Sales Effectiveness Reports does not show data until after that initial period.

There are two types of reports:

- **Custom reports.** Custom reports are those created by you or your co-workers. They are available in the Custom Reports and Analyses section of the Reports Homepage. You can access your previously created reports using the My Analysis link. You can access shared reports created by you and your co-workers using the Shared Custom Analysis link. For more information on accessing the existing custom reports, see Setting Up Report Folders (on page 922). To create your own custom report, click the Design Analysis link. For more information on creating your own custom report, see Getting Started with Answers (Custom Reports) (on page 933).

- **Prebuilt reports.** Prebuilt reports are provided with Oracle CRM On Demand. They are available in the Quick Lists, Pipeline Analysis, Sales Effectiveness, Customers, Service, and Marketing Effectiveness sections of the Reports Homepage. You cannot edit or delete the prebuilt reports. However, you can open, edit, and save these reports under different names. You can use them to form the basis of a new custom report. For more information about prebuilt reports, see About Prebuilt Reports (on page 915).

Related Topics

See the following topics for related information:

About Visibility to Records in Analytics (on page 908)

About Prebuilt Reports (on page 915)

About Custom Fiscal Calendar in Oracle CRM On Demand Answers (on page 920)

Managing Analyses (on page 921)

Getting Started with Answers (Custom Reports) (on page 933)

About Limitations in Reports (on page 937)

Dashboards (on page 1295)

Optimising Performance (see "Optimizing Performance" on page 1288)

About Visibility to Records in Analytics

Several settings in Analytics control visibility. They are applied in the following order:

1 Access All Data in Analytics setting (in role privileges)

2 Reporting Subject Area setting in user profile

3 Historical Subject Area setting in user profile

4 Books and the Book selector

5 User Delegation

6 Role-Based Can Read All Records setting (in company and user profiles)

A company administrator using these settings can control what records appear on the reports that you run. For example, a manager can display the manager's own opportunities and the opportunities of employees who report to that manager, but a sales representative's settings limit the opportunities to only the opportunities that belong to the sales representative.

Access All Data in Analytics Setting

Users with the Access All Data in Analytics privilege in their role set-ups have complete visibility to all of the data in the entire organisation, including records marked Private. This privilege is typically given to the company administrator. This privilege overrides any Analytics Visibility setting.

If the user role does not have the Access All Data in Analytics privilege, the Analytics Visibility setting specified in the company or user profile determines which data users can display in reports.

Reporting Subject Area Setting

This setting is generally used for all users in the organisation who are not company administrators. This setting is available on both the company and user profiles. If this setting is not defined on a user's profile, then the company profile setting applies. This setting has the following values:

- **Manager Visibility.** Allows you to display your own data and all the data that is directly owned by your subordinates, including records marked Private

- **Team Visibility.** Allows you to display your own data and all the data that has been shared with you through the account and opportunity teams and through group assignment

Historical Subject Area

This setting is generally used for all users in the organisation who are not company administrators. This setting is available on both the company and user profiles. If this setting is not defined on a user's profile, then the company profile setting applies.

This setting has the following possible values:

- **Manager Visibility.** Allows you to display your own data and all the data that is directly owned by your subordinates, including records marked Private

- **Team Visibility.** Allows you to display your own data and all the data that has been shared with you through the account and opportunity teams and through group assignment

- **Full Visibility**. Combines manager and team visibility to display data that is owned by you and your subordinates and data shared with you and your subordinates.

Books and the Book Selector

If you have the Full Visibility setting, the Books feature allows further control of which data displays in reports. Using the Book selector on the Reports pages, you can restrict the data to that contained in a book and its sub books, if it has any. This feature is available only if you are assigned to one or more books and are using an Analytic (not Reporting) subject area. If you have the Access All Data in Analytics privilege, you continue to display all data no matter which book is selected. Also, Role-Based Can Read All Records visibility overrides Book visibility in Analytics.

A company administrator can set a default book for the Book selector on the Reports pages for each user. You specify this setting in the Default Book for Analytics field on the user profile.

Note: If the default book on your profile is set to a book that cannot contain data or is set to a book that you do not have access to, then you get an error indicating that access is denied.

The data associated with a book, which is used to implement territory management and alignment activation in Oracle CRM On Demand, is also supported in Oracle CRM On Demand Answers through book visibility. When you select a book in the Book selector, Oracle CRM On Demand Answers shows only the active account and contact records associated with the book. The records whose association with a book have been deleted or will become active do not appear in reports.

Book Ownership

Users and custom books can own account and contact records. Book ownership provides the ability to simulate territories. When a record is owned exclusively by a book, that record is visible only through the book

visibility. Similarly, when a record is owned exclusively by a user and is not associated with any book, then that record is not visible through the book visibility. To further illustrate the record ownership mode, consider the example in the following table.

Account Record	Record Ownership	Book Association	Description
Action Rentals	User (Lucy Harris)	None	Action Rentals is owned by Lucy Harris and is not associated with any book.
Bobcat Corp.	Book (West)	West	Bobcat Corp. is owned by the West book, and so West becomes the primary book.
Coastal Company	User (Lucy Harris)	West	Coastal Company is owned by Lucy Harris and is associated with the West book in the child applet.

Results

The following records appear in Manager, Team, and Full visibility modes for Lucy Harris because these records are owned by her or shared by her:

- Action Rentals

- Coastal Company

The Bobcat Corp. record does not appear in these modes because this record is exclusively owned by West book. The following records appear when West book is selected from the book selector because these records are either owned by or associated with West book:

- Bobcat Corp.

- Coastal Company

The Action Rentals record does not appear in the Book visibility mode because this record is exclusively owned by the user, Lucy Harris. For more information, see About Data Access, Record Sharing, and Record Ownership (on page 47) and About Record Ownership Modes.

User Delegation

The User Delegation feature allows further control of which data displays in reports. Using the Book selector, you can view data from any user who has added you to their Delegated User list. You can select the user's name from the Book selector to see report data for that user. You no longer display your own data in the report, but only the data of the selected user. However, your Analytics Visibility setting is still in effect. For example, if Ryan added you to his delegated user list, and his Analytics Visibility setting is Manager Visibility, you do not necessarily display the same data in the report that Ryan does unless Manager Visibility is also your setting.

Role-Based Can Read All Records Setting

This control is present in both the company profile and user profiles. This control determines whether Oracle CRM On Demand Answers takes into account a role's setting for Can Read All Records for record types. When

this control is set to Yes in the company profile or set to Yes or Null in a user's profile, and also any record type has the Can Read All Records flag checked, then a user can display all records for that record type in reports. When these conditions are not met, Oracle CRM On Demand Answers enforces the default visibility settings that are defined in the Reporting and Analytics subject areas.

If Role-Based Can Read All Records is enabled for a user, then Oracle CRM On Demand Answers ignores the visibility setting on the record types checked with Can Read All Records in the role definition. For other record types, Oracle CRM On Demand Answers enforces visibility, which is based on the default visibility settings for reporting and historical subject areas. For example, if Role-Based Can Read All Records is enabled for your profile, your visibility setting for the reporting subject areas is set to Manager Visibility, and Can Read All Records is set for Opportunity but not for Contact record types, then all opportunities are displayed when you run a report, but only for contacts owned by you and your subordinates.

Companies and company administrators must be aware of the following considerations when using the Role-Based Can Read All Records type setting in Analytics:

■ Role-based record type visibility overrides Book visibility. When you select a book in the Book Selector with the role-based record type visibility enabled and the Can Read All Records setting defined on a record type for your role, all records for that record type are displayed, not just those contained in that book.

■ Role-based record type visibility overrides the user hierarchy and user delegation aspects of visibility in Analytics. When you select a user in the Book Selector with role-based record type visibility enabled and the Can Read All Records setting defined on a record type for your role, all records of that record type are displayed, not just those that you expect to see for the selected user.

■ In reports with two or more record types, the visibility to records is based on the record type with the most restrictive visibility control. For example, if the role-based record type visibility is enabled on the contact record type, but not on the opportunity record type and when both record types are on the report, Analytics shows only the opportunities the user has access to and their associated contacts.

■ In historical subject areas, access to the employee record type is always based on the manager visibility. However, this restriction does not apply to real-time subject areas. The visibility of role-based record types does not affect this restriction.

■ Access to user quota is always based on the manager visibility in both real time and in historical subject areas. Role-based record type visibility does not affect this behaviour.

Security and Data Visibility in Analytic and Reporting Subject Areas

The data seen in reports is based on the security and data visibility defined for record types and the default visibility settings defined for the analytic and reporting subject areas. Most record types are secured in every subject area, but there are exceptions to this rule to support the reporting needs of associated record types even when these associated record types are not explicitly shared or owned by a user. For example, the account record type is secured only in subject areas where account is the primary driving record type but is unrestricted in the remaining subject areas.

The purpose for keeping a record type unrestricted in a subject area is that it allows you to report on the associations between record types. For example, in the Lead History subject area you can report on leads that are owned or shared by you and those leads' corresponding accounts even where those associated accounts are not owned or shared by you.

The following table details the visibility of record types in the analytic subject areas.

Record type	Subject Area	Manager Visibility	Team Visibility	Full Visibility
Account	Account Address	Secured	Secured	Secured
	Account Competitor History	Secured	Secured	Secured
	Account and Partner History	Secured	Secured	Secured
	Account and Related Account History	Secured	Secured	Secured
	Account Contact History	Secured	Secured	Secured
	Account History	Secured	Secured	Secured
	Account Team History	Secured based on team visibility	Secured based on team visibility	Secured
	Other subject areas	Unrestricted	Unrestricted	Unrestricted
Account Competitor	All	Unrestricted	Unrestricted	Unrestricted
Account Partner	All	Unrestricted	Unrestricted	Unrestricted
Account Related Account	All	Unrestricted	Unrestricted	Unrestricted
Account Revenue	All	Secured	Unrestricted	Unrestricted
Activity	All	Secured	Secured	Secured
Asset	All	Secured based on the account record type	Secured based on the account record type	Secured based on the account record type
Call Activity	All	Secured	Secured	Secured
Campaign	All	Unrestricted	Unrestricted	Unrestricted
Contact	Contact Team History	Secured based on team visibility	Secured based on team visibility	Secured based on team visibility
	Other subject areas	Secured	Secured	Secured
Contact Interests	All	Secured	Secured	Secured
Contact	All	Secured	Secured	Secured

Record type	Subject Area	Manager Visibility	Team Visibility	Full Visibility
Revenue				
Dealer	Dealer History	Secured	Secured	Secured
	Other subject areas	Unrestricted	Unrestricted	Unrestricted
Employee	All	Secured	Unrestricted	Unrestricted
Event	All	Secured	Secured	Secured
Household	All	Secured	Secured	Secured
Opportunity	Opportunity Team	Secured based on team visibility	Secured based on team visibility	Secured
	Other subject areas	Secured	Secured	Secured
Opportunity Competitor	All	Unrestricted	Unrestricted	Unrestricted
Opportunity Partner	All	Unrestricted	Unrestricted	Unrestricted
Partner	All	Secured	Secured	Secured
Portfolio	All	Secured	Secured	Secured
Product Revenue	All	Secured	Secured based on the opportunity record type of the product revenues	Secured based on the opportunity record type for manager visibility and based on the opportunity record type of the product revenues for team visibility
Quota	All	Secured based on manager visibility	Secured based on manager visibility	Secured based on manager visibility
Relationship Contact	All	Unrestricted	Unrestricted	Unrestricted
Service Request	All	Secured	Secured	Secured
Shared Address	All	Unrestricted	Unrestricted	Unrestricted
Solutions	All	Only solutions created by the user and subordinates.	Only solutions created by the user.	Only solutions created by the user and subordinates.

The following table details the visibility of record types in the reporting subject areas.

Record type	Subject Area	Manager Visibility	Team Visibility
Account	Accounts	Secured	Secured
	Accounts and Competitors	Secured	Secured
	Accounts and Partners	Secured	Secured
	Accounts and Related Accounts	Secured	Secured
	Custom Objects 1,2,3 and Accounts	Secured	Secured
	Other subject areas	Unrestricted	Unrestricted
Account Competitor	All	Unrestricted	Unrestricted
Account Partner	All	Unrestricted	Unrestricted
Account Related Account	All	Unrestricted	Unrestricted
Activity	Shared Activities	Secured based on team visibility	Secured based on team visibility
	Other subject areas	Secured	Secured
Asset	All	Secured based on Account	Secured based on Account
Campaign	All	Unrestricted	Unrestricted
Contact	All	Secured	Secured
Custom Objects 1-15	All	Secured	Secured
Dealer	All	Unrestricted	Unrestricted
Employee	All	Unrestricted	Unrestricted
Household	All	Secured	Secured
Lead	All	Secured	Secured
Opportunity	Opportunity Team	Secured based on team visibility	Secured based on team visibility

Record type	Subject Area	Manager Visibility	Team Visibility
	Other subject areas	Secured	Secured
Opportunity Competitor	All	Unrestricted	Unrestricted
Opportunity Partner	All	Unrestricted	Unrestricted
Product Revenue	All	Secured	Secured based on the opportunity record type of the product revenues
Quota	All	Secured based on manager visibility	Secured based on manager visibility
Relationship Contact	All	Unrestricted	Unrestricted
Service Request	All	Secured	Secured
Solutions	All	Only solutions created by the user and subordinates.	Only solutions created by the user.
Vehicle	All	Only solutions created by the user and subordinates.	Only solutions created by the user.

Notes:

1. Role-based record type visibility is enabled on all record types.

2. Book visibility in Oracle CRM On Demand Answers is enabled for the following record types: Account, Activity, Asset (Based on Account), Contact, Event, Household, Lead, Opportunity, Product Revenue, Service Request, Solutions, and Custom Objects 1 to 15. The Book visibility in reporting subject areas shows records in the current book, but in analytic subject areas it shows records contained in the sub books as well.

3. Visibility control is not applied to Account metrics when the query involves only Account metrics. To enable visibility control, include a field from the Account dimension.

About Prebuilt Reports

Oracle CRM On Demand provides a number of prebuilt reports. You cannot edit or delete prebuilt reports. However, you can open, edit, and save these reports under different names. You can use them to form the basis of a new custom report. These reports are on the Reports Homepage and are organised into the following sections:

- Quick Lists
- Pipeline Analysis
- Sales Effectiveness
- Customers
- Service
- Marketing Effectiveness
- Usage Tracking

Note: The Prebuilt reports appear only if your user role has this privilege: Analytics Reports - View Prebuilt Analyses.

Quick Lists

The following table lists the information.

Report Name	Description
Opportunities By Account	Displays a list of all of your opportunities by account
Opportunities By Sales Stage	Displays a list of all of your opportunities by sales stage
Activities By Opportunity	Creates and evaluates a list of all of your activities by opportunity
Accounts By Sales Rep	Displays a list of all of your accounts by sales representative
Contact Mailing List	Displays and prints a mailing list of all of your contacts by account
Employee List	Displays a full list of the users of Oracle CRM On Demand at your company

Pipeline Analysis

The following table lists the information.

Report Name	Description
Pipeline Analysis	Analyses your pipeline to identify opportunities and challenges
Opportunity Revenue Analysis	Analyses your opportunity revenue
Pipeline Quality Analysis	Evaluates the quality of your deals and identifies the most important deals that can be targeted and closed quickly

Report Name	Description
Team Pipeline Analysis	Analyses your deals by team
Top 10 Opportunities	Views and analyses the top ten deals
Historical Pipeline Analysis	Analyses the pipeline on a historical basis to evaluate the current performance compared with past expectations
Historical Expected Revenue Quarterly Analysis	Compares the historical expected revenue with current revenue by quarter
Historical Opportunity Revenue Quarterly Analysis	Compares the historical opportunity revenue with current revenue by quarter
Quarterly Closed Revenue Analysis	Compares the closed revenue from the last quarter with the current revenue
Opportunity vs. Expected Revenue vs. Closed Revenue	Provides insight in one view of your quarterly revenue performance
Sales Stage History Analysis	Analyses the pipeline activity and other metrics for the sales stage history

Sales Effectiveness

The following table lists the information.

Report Name	Description
Top Performers List	Views, analyses, and identifies your top performers in the regions, industries, and so on
Quarterly Sales Effectiveness Analysis	Analyses the sales effectiveness quarter-to-quarter by subordinate
Team Sales Effectiveness Analysis	Analyses the sales effectiveness by team
Team Activity Analysis	Analyses team activity to improve team productivity
Team Win Rate Analysis	Evaluates the effectiveness of the team win-rate
Team Average Sales Cycle Analysis	Analyses the effectiveness of the average sales cycle of the team

Customers

The following table lists the information.

Report Name	Description

Report Name	Description
Number of Accounts Opportunity Analysis	Analyses the total number of accounts with opportunities by different demographics
Number of Accounts Analysis	Analyses the total number of accounts by different demographics
Contact Analysis by Opportunity	Analyses the number of contacts with opportunities by multiple criteria
Contact Analysis by Account	Analyses the total number of contacts by account criteria
Top 10 Customers	Views and analyses your top ten accounts
Account Analysis	Analyses your accounts and customers
Closed Revenue by Account Analysis	Analyses the closed revenue by account demographics

Service

The following table lists the information.

Report Name	Description
Service Analysis	Identifies important service problems and tracks service trends in your area.
Service Report List	Reviews a list of the important service requests. This data is refreshed daily.
Current Service Request Aging Analysis	Analyses and manages the aging of your service requests.
Open Service Request Analysis	Evaluates and analyses your open service requests.
Number of Service Request Analysis	Evaluates and analyses your total number of service requests.
Team Service Analysis	Analyses service requests by team member.

Marketing Effectiveness

The following table lists the information.

Report Name	Description
Active Campaign Status	Analyses the performance metrics for active campaigns.
Completed Campaign Results	Generates graphs and compares specific

Report Name	Description
	performance metrics for completed campaigns.
Campaign Effectiveness by Campaign Name	Evaluates selected performance metrics for completed campaigns.
Campaign Effectiveness by Campaign Type	Evaluates selected performance metrics by campaign type for completed campaigns.
Lead Follow-up Analysis	Analyses the age, follow-up, and status trends for leads.
Lead Source Analysis	Analyses volume trends for leads by lead source.
Opportunity Source Analysis by Close Date	Tracks the trend for lead sources for opportunities based on the closing date for the opportunity.
Opportunity Source Analysis by Create Date	Tracks the trend for lead sources for opportunities based on the creation date for the opportunity.
Projected Revenue	Estimates future closed revenue. The estimate is based on the past performance metrics.

Usage Tracking

The Usage Tracking reports are available to users who have the Usage Tracking privilege. The following table lists the information.

Report Name	Description
Application Object Usage Analysis	Analyses record type usage in your application by calendar quarter of the selected year.
User Adoption Analysis	Analyses user adoption of your application based on the user logins.
Set-up and Configuration Overview	Displays a summary of application set-up and configuration details for your company.
User Logins By Role	Displays and analyses user logins by role by calendar year and month.
User Logins By Top 25 Users	Displays and analyses your top user logins by calendar year and month.
Top 10 Page Views	Displays and analyses the performance of the top 10 page views of your application.
Analytics Performance	Displays an analysis of the performance of your reporting and analytic queries and dashboards.

Report Metrics

The following metrics appear in some of the previous reports:

- **Avg Deal Size.** The average deal size based on the opportunity revenue, which is converted to the user's default currency.

- **Cost per Closed Sale.** The cost divided by the number of wins.

- **Cost per Lead.** The cost divided by the number of leads.

- **ROI (Return On Investment).** The Return On Investment ratio is calculated using the total opportunity revenue that is derived from the campaign (Gain) and the total cost of the campaign (Cost). The formula is (Gain minus Cost) divided by Cost.

- **Opportunity Win Rate.** The percentage of the opportunities won.

About Custom Fiscal Calendar in Oracle CRM On Demand Answers

Oracle CRM On Demand Answers supports multiple forms of calendar options:

- **Calendar Quarter.** A fiscal calendar type where the fiscal year can start on any day and month. Each fiscal year of 12 months consists of four quarters of three months each. Each month is a whole month and starts and ends on the same date.

- **5-4-4 Model.** A fiscal calendar type where the fiscal year can start on any day and month. Each fiscal year of 12 months consists of four quarters of three months each. The first month is 5 weeks long, and the second and third months are 4 weeks long.

- **4-4-5 Model.** A fiscal calendar type where the fiscal year can start on any day and month. Each fiscal year of 12 months consists of four quarters of three months each. The first and second months are 4 weeks long, and the third month is 5 weeks long.

- **Custom Fiscal Calendar.** A fiscal calendar type with unique start and end dates for each year. It also allows a company to uniquely handle years that have a fifty-third week or leap week.

The date dimension is generated already for 41 years (2000 to 2040) for all calendar types except the custom fiscal calendar type. Hence, companies defined with calendar quarter, 4-4-5 or 5-4-4 calendar type can analyse their fiscal metrics for data with dates that fall within this range (2000 to 2040). Analysing data by fiscal and calendar periods when accessed or joined through date dimensions that are outside this range is not possible.

For companies on a custom fiscal calendar, they can analyse the fiscal metrics through the date dimension only for the years defined in Oracle CRM On Demand. For example, if you define your fiscal calendar for the years 2000 to 2010, then you can analyse the fiscal metrics for these 11 years only. If a record is created or started or ended on a date that is outside this range, that record is still visible in Oracle CRM On Demand Answers reports as long as it is not accessed or joined through the date dimension table.

You must be familiar with the following considerations when your company is using a custom fiscal calendar:

■ If your company changes the fiscal calendar type from a standard or regular fiscal calendar (calendar quarter, 4-4-5, 5-4-4 models) to a custom fiscal calendar, the change is not immediate. Your company must request a full ETL (Extract, Transform, and Load) for the change to be complete.

■ If your company changes the fiscal calendar from a standard or regular fiscal calendar to a custom fiscal calendar, it is not possible to analyse the historical pipeline snapshots in Oracle CRM On Demand Answers for the fiscal years that were not defined in the custom fiscal calendar. Historical snapshots cannot be aligned with the new calendar definition.

■ If your company changes the custom fiscal calendar definition for an existing year, this change is not reflected until a full ETL is performed.

■ The custom fiscal calendar definition for new companies as well as calendar definitions of new fiscal years for existing companies are processed during the nightly refresh.

■ The fiscal calendar code field in the date dimension can be used to decode the fiscal calendar definition for companies on a standard calendar or regular fiscal calendar. However, for companies using a custom fiscal calendar this code cannot be guaranteed to be consistent and therefore it cannot be reliably decoded.

■ Companies that choose to use a custom fiscal calendar must enter fiscal calendar definitions, starting from the earliest year available and proceed sequentially without any gap in the fiscal year definitions. If you want to define calendar definitions for earlier years, you can do so, but you must request a full ETL.

Managing Analyses

To manage analyses, do the following tasks:

■ Setting Up Report Folders (on page 922)

■ Setting Up User Visibility to Shared Report Folders (on page 923)

■ Reviewing Report Data (on page 926)

■ Printing Reports (on page 926)

■ Running Reports (on page 927)

■ Downloading Reports (on page 929)

■ Deleting Reports (on page 931)

■ Renaming Reports (on page 931)

■ Copying and Moving Reports (on page 932)

If your role includes the Manage Custom Reports privilege, you can perform the following additional procedures:

■ Getting Started with Answers (Custom Reports) (on page 933)

■ Making Custom Reports Public (on page 1244)

Related Topics

See the following topic for related information:

■ Reports (on page 907)

Setting Up Report Folders

You can set up report folders and limit user visibility to those folders. After that, only users granted visibility to certain folders can display them on their Reports Homepage.

Setting up report folders consists of these general steps:

1 Create folders and subfolders (in Oracle CRM On Demand Answers).

2 Assign user visibility to folders (from the administration pages of Oracle CRM On Demand).

For more information about setting up user visibility, see Setting Up User Visibility to Shared Report Folders (on page 923).

3 Populate folders with reports (in Oracle CRM On Demand Answers).

Note: To perform this procedure, your user role must include the Manage Custom Reports privilege.

To create a report folder

1 In Oracle CRM On Demand, click the Reports tab.

2 On the Reports Homepage, in the Custom Reports and Analyses section, click Design Analyses to open Oracle CRM On Demand Answers.

3 In Oracle CRM On Demand Answers, click Manage Analyses.

4 In the Manage Analyses window, select one of these options:

■ My Folders. This stores the new folder in your private folder directory.

■ Shared Folders. This stores the new folder in the company-wide shared folder.

5 If you want to create the folder as a subfolder of another folder, open the parent folder.

6 Click Create New Folder.

7 Enter the folder name and description.

NOTE: Restrict report folders names to 255 characters or less. Visibility cannot be configured for shared report folders with names greater than 255 characters.

8 Click Create Folder.

When a folder is created, it becomes visible on the Reports Homepage. All users with access to the Shared Custom Analyses folder can see the newly created Company Wide Shared folders. If needed,

visibility to the shared folder may be restricted by linking user roles to it. If no user roles are linked to the folder, visibility remains public.

If a new folder is created in My Folders, it becomes visible in the My Analyses folder, which is available from the Reports tab of Oracle CRM On Demand. This folder contains private reports only. Other users cannot see them.

For more information, see Setting Up User Visibility to Shared Report Folders (on page 923).

To rename a folder

1 In the Manage Analyses window, in the folder row, click Rename.

2 Enter the new name.

3 (Recommended) Select Preserve references to old name of this item.

4 Click Update.

To delete a folder

◼ In the Manage Analyses window, in the folder row, click Delete, and then confirm your action.

To populate a report folder with reports

◼ Do one of the following:

  ◼ Create the report, and then save it in the folder.

  ◼ Copy or move an existing saved report from one folder to another.

    For more information on copying and moving reports, see Copying and Moving Reports (on page 932).

Setting Up User Visibility to Shared Report Folders

By default, all user roles have visibility to each shared folder. You can override the default by manually linking specific roles to individual folders. However, if you manually link a user role to a folder, Oracle CRM On Demand revokes visibility for all other user roles (except the Administrator role) to that folder. You must continue to manually link each role that should have visibility.

If you link a role to a folder with subfolders, then the role is also linked to all its subfolders. To change this, navigate to the subfolder and make any required changes. For each folder, the access level that is assigned to your user role controls your permissions in that folder. The access level permissions are as follows:

◼ **Read.** (Default) You can open and display reports in the folder.

◼ **Change/Delete.** You can display, edit, and delete reports in the folder, as well as create new folders and rename subfolders within the current folder. However, you cannot rename the current folder using this access level.

Reports

Your access level also controls the Manage Analyses, Open Analysis, and Save Analysis actions as shown in the following table.

Action	Description
Manage Analyses	■ **Read.** You can display only the contents. You cannot enable any actions. ■ **Change/Delete**. You can create new folders and copy, delete, move, and rename reports.
Open Analysis	This action shows only the nonempty folders for which your user role has a Read or Change/Delete access level.
Save Analysis	You can save reports to only those folders for which your user role has the Change/Delete access level.

The Administrator role has visibility to all folders at all times. Consequently, the Administrator role cannot be manually linked to or removed from a folder. Any custom role created by copying the Administrator role inherits this same visibility to all folders at all times, regardless of whether or not the role is manually linked to or unlinked from folders.

The Manage Custom Reports analytics privilege enables a user role to create and save custom reports in any report folder regardless of whether the individual user has visibility access to folders.

Before you begin. To perform this procedure, your role must include the Manage Content privilege.

To set up user visibility to a shared report folder

1   In the upper-right corner of any page in Oracle CRM On Demand (not Oracle CRM On Demand Answers), click the Admin global link.

2   On the Admin Homepage, in the Content Management section, click the Content Management link.

3   On the Content Management page, in the Report Folders section, click the Shared Custom Analyses link.

The Folders List page displays all subfolders for the Shared Custom Analyses parent folder.

NOTE: All users have visibility to the Shared Custom Analyses root folder.

4   Select a folder, as follows:

■   If the folder where you want to set up visibility is a top-level folder, click the folder name.

■   If the folder where you want to set up visibility is a subfolder, click the Subfolders link for the parent folder until you reach the appropriate folder, then click the folder name.

5   To give certain roles visibility to the folder:

a   On the Folder Details page, click Add Roles.

b   Click the Lookup icon next to each Role field to link user roles.

c   Choose an Access Level (either Read or Change/Delete) from the drop down menu.

d   Click Save.

6 To remove a role that was previously given visibility to the folder:

    a On the Folder Details page, in the record-level menu for the role, select Remove.

    b Click OK.

7 To edit the access level for a role that was previously given visibility to the folder:

    a On the Folder Details page, in the record-level menu for the role, select Edit.

    b On the Edit Role Access page, modify the Access Level.

    c Click Save.

TIP: When you set visibility for a subfolder, you can click the folder name in the Parent Folder field to return to the Folder Details page for the parent folder.

Sharing Private Reports

Visibility to the user's My Analyses private reports folder is restricted to the Oracle CRM On Demand session user only. The My Analyses folder contains reports that were created by the user and then stored as private. Users who have the Manage Custom Reports privilege can share Private reports with others by saving them in the Company-Wide Shared Folder.

To share a private report

1 In Oracle CRM On Demand, click the Reports tab.

2 On the Reports Homepage, in the Custom Reports and Analyses section, click Design Analyses to open Oracle CRM On Demand Answers.

3 In Oracle CRM On Demand Answers, click Open Analysis.

4 In the Open Analysis dialog box, navigate to the analysis, select it, and click OK.

5 In the Build and View Analysis page, click Save.

6 In the Save Analysis dialog box, select a destination folder (such as Company Wide Shared Folder) within the Shared Folders folder, and click OK.

About Sharing and Hiding Prebuilt Reports

Prebuilt reports are shared to all company users.

The Access Analytics Reports - View Prebuilt Analyses privilege controls whether or not shared prebuilt analyses are exposed to users for specific roles. If Access Analytics Reports - View Prebuilt Analyses is enabled for a user role, all shared prebuilt analyses appear on their Reports tab. If the privilege is not enabled for the user role, then all prebuilt analyses are hidden.

To hide specific shared prebuilt reports and display others, deselect the Access Analytics Reports - View Prebuilt Analyses privilege. This hides all shared prebuilt reports. Then to share specific prebuilt reports, go to Oracle CRM On Demand Answers, open the report that you want to share, and save it in a shared folder within Company Wide Shared Folder. Configure the shared folder visibility as required.

NOTE: The Access Analytics Reports - View Prebuilt Analyses privilege determines whether or not you have access to prebuilt reports. If you do not have this privilege enabled, regardless of where you access the reports from, such as the Reports tab, Homepage, dashboard, Web applet, or Web tab, the reports are not displayed, and you might get an error message.

Reviewing Report Data

Report data is shown in lists, tables, charts, or graphs. For many reports, you can select different categories to reorganise the same data from a different perspective. For example, you can display your accounts grouped first by region, and then change the selection to display the same data grouped by industry.

For lists and tables, null values appear as empty fields, except for the following:

- Id fields, such as Account Id, Contact Id, and so on where they appear as negative numbers

- Record type name fields, such as Account Name, Contact Full Name, Custom Object 1 Name, and so on where they appear as *Unspecified*

For charts and graphs, you can also drill down on each segment to see the records comprising that segment.

To compare relative and absolute numbers, many chart reports also show a table of supporting data metrics.

To change the perspective of the report

- From the drop-down list, select another category to reorganise the same data from a different perspective.

To view the records comprising a segment of the chart or graph

- On the chart, click a segment of the pie chart or bar graph.

  A list appears of the underlying opportunities, accounts, or service requests contributing to that segment.

Printing Reports

You can print a report from the Reports Homepage or, if your role includes the Manage Custom Reports privilege, from Oracle CRM On Demand Answers.

TIP: Printing in landscape mode optimises the appearance of a report.

To print a report from the Reports Homepage

1 In Oracle CRM On Demand, click the Reports tab.

2 On the Reports Homepage, click the link for the report that you want to print:

- ■ To print a prebuilt report, click the link for the report on the Reports Homepage.

- ■ To print a custom report, drill down on the My Analyses folder or the Shared Analyses folder, and click the link for the custom report.

3 Scroll to the bottom of the report page, click Printer Friendly, then select HTML or PDF, depending on the format that you want.

The report opens in a separate window.

4 In the report window, in the browser menu, select File, then Print.

5 In the print window, select your preferences, then print the report.

6 Close the report window.

To print a report from within Oracle CRM On Demand Answers

1 In Oracle CRM On Demand, click the Reports tab.

2 On the Reports Homepage, in the Custom Reports and Analyses section, click Design Analyses to open Oracle CRM On Demand Answers.

3 On the Oracle CRM On Demand Answers page, click Open Analysis.

4 In the Open Analysis dialog box, locate and select the analysis you want to print and then click OK.

5 In the Build and View Analysis page, in the title bar, click Preview Analysis.

6 Scroll to the bottom of the report, click Printer Friendly, then select HTML or PDF.

The report opens in a separate window.

7 In the report window, in the browser menu, select File, then Print.

8 In the print window, select your preferences, then print the report.

9 Close the report window.

Running Reports

Although you can view reports on different pages in your application, the Reports Homepage provides a single point of access to all prebuilt reports and public custom reports.

To run a report

1 In Oracle CRM On Demand, click the Reports tab.

   The Reports Homepage groups the reports under these categories:

Category	Description
Custom Reports and Analyses	All custom reports are created by users at your company. Reports released to some or all employees are Shared Custom Analyses, while private reports are My Analyses. Only users with roles that include the Manage Custom Reports privilege can create custom reports using the Design Analyses link.
Quick Lists	Reports used for standard list reporting rather than interactive or graphical analytics.
Pipeline Analysis	Reports to help you evaluate your company{\f2 '}s sales and team effectiveness.
Sales Effectiveness	Reports to help you evaluate your company{\f2 '}s historical and current pipeline trends and performance.
Customers	Reports to help you evaluate the quality and demographics of your accounts and contacts.
Service	Reports to evaluate the effectiveness of your service organisation.
Communications	Reports to help you evaluate statistics regarding your Oracle Contact On Demand use, based on each workgroup and project. The Communications section appears if your user role has the privilege for viewing this dashboard.
Marketing Effectiveness	Reports to help you evaluate the effectiveness of your campaign and lead management activities.

2 On the Reports Homepage, click the link for the prebuilt report that you want to run, or drill down into a folder to click on the link to a custom report that you want to run.

   The report information appears on the Reports page.

3 Depending on the specific report, you may be able to perform the following tasks on the Reports page:

   ■ To show the data from a different perspective, select other options from the drop-down lists.

   ■ To view exact totals for a segment in a chart or graph, place the pointer over the segment.

   ■ To view the records belonging to a segment, click the segment. The list of records appears with its specific data.

   ■ To filter on a reporting level, select an option from the Reporting Level drop-down list:

Reporting Level	Description
(All Choices)	A report that runs on data owned by any user whom the session user has visibility to in Oracle CRM On Demand Answers.

Reporting Level	Description
0	Report run on data owned by the session user only.
1	Report run on data owned by users 1 level beneath the session user in the organisational hierarchy, and all levels above the selected level.
2	Report run on data owned by users 2 levels beneath the session user in the organisational hierarchy, and all levels above the selected level.

■ To download the report, scroll to the bottom of the report page, click Download, select the option you want, then follow the onscreen instructions to download the report.

■ For reports based on real-time subject areas, click the Refresh link at the bottom of the page to display current, real-time data.

■ To print the report, click the Printer Friendly link at the bottom of the page.

Related Topics

See the following topics for related information:

■ Reports (on page 907)

■ Reviewing Report Data (on page 926)

Downloading Reports

You can download a report from the Reports Homepage if your role can access the report. Reports can also be downloaded from Preview Analysis in Oracle CRM On Demand Answers, if your role includes the Manage Custom Reports or Manage Personal Reports privilege.

To download a report from the Reports Homepage

1 Click the Reports tab.

2 On the Reports Homepage, click the link for the report you want to download.

3 Scroll to the bottom of the report page, click the Download link, and select one of the following options from the drop-down list:

■ Download to Microsoft Excel 2002 or later.

■ Download to Excel 2000

NOTE: Downloading charts to Excel 2000 is not supported; only data can be downloaded.

■ Download Data (.csv)

■ Download Data (.txt)

■ Download Web Page (MHTML)

4 Follow the on-screen instructions to download the report.

5 Click Back to Reports Homepage to return to the Reports Homepage.

To download a report from Oracle CRM On Demand Answers

1 Click the Reports tab.

2 On the Reports Homepage, in the Custom Reports and Analyses section, click Design Analyses.

Oracle CRM On Demand Answers appears in a separate page, independent of the other Oracle CRM On Demand pages.

3 From the Open Existing Analysis section, click Open Analysis.

4 In the Open Analysis dialog box, locate and select the analysis you want to download and then click OK.

5 In the Build and View Analysis page, in the title bar, click Preview Analysis.

6 Scroll to the bottom of the report, click the Download link, and select one of the following options:

■ Download to Microsoft Excel 2002 or later.

■ Download to Excel (2000)

■ Download Data (.csv)

■ Download Data (.txt)

■ Download Web Page (MHTML)

7 Follow the on-screen instructions to download the report.

8 Click Close Window in the upper-right corner of the report to return to the Oracle CRM On Demand Answers page.

9 Click Close Window on the Oracle CRM On Demand Answers page to return to the Reports Homepage.

Importing Your Downloaded Report

Within Excel, choose File then Open to import your downloaded report. If the data appears in a single column, select that column and choose Data then Text to Columns. In some versions of Excel, you can also double-click the downloaded file icon in Windows Explorer to import your downloaded report.

Oracle CRM On Demand Answers reports downloaded in CSV mode do not delimit the data automatically when opening in Microsoft Excel. After downloading a report in CSV mode, use Microsoft Excel's Convert Text to Columns wizard with the comma-delimiter option. For more information about the compatibility of the different versions of Microsoft Excel, contact your internal IT support team.

Delimiting a CSV file in Microsoft Excel

Perform the following procedure to delimit a CSV file in Microsoft Excel (Windows 2003 or 2007).

To delimit a CSV file in Microsoft Excel (Windows 2003 or 2007)

1   Press CTRL-A to select all the data.

2   In the Data tab, click Text to Columns.

    The Convert Text to Columns Wizard appears.

3   Select Delimited, then click Next.

4   Select Comma and deselect all the other check boxes, then click Next.

5   Select General, and then click Finish.

Deleting Reports

You can delete reports you have created. You cannot delete reports created by other users.

To delete reports that you have created

1   Click the Reports tab.

2   On the Reports Homepage, in the Custom Reports and Analyses section, click Design Analyses.

3   On the Oracle CRM On Demand Answers page, in the Manage Analyses section, click the Manage Analyses button.

4   In the Manage Analyses window, select the folder containing the report.

5   In the report row, click Delete, and then confirm the deletion by selecting Yes.

6   Click Getting Started at the top of the page to return to the Getting Started With Answers page.

Renaming Reports

You can rename reports you have created. You can only rename reports you have created, you cannot rename reports created by other users.

To rename reports that you have created

1 Click the Reports tab.

2 On the Reports Homepage, in the Custom Reports and Analyses section, click Design Analyses.

3 On the Oracle CRM On Demand Answers page, in the Manage Analyses section, click the Manage Analyses button.

4 In the Manage Analyses window, select the folder containing the report that you want to rename.

5 In the report row, click Rename.

6 Update the Name field.

7 If necessary, update the Description field (up to 2,000 characters).

   If your report is a public one, the text for both the Name and Description fields is displayed on the employee's Reports Homepage exactly as you enter it.

8 Click Update.

9 Click Getting Started at the top of the page to return to the Getting Started With Answers page.

Copying and Moving Reports

You can copy a report from one folder to another in two ways:

■ By opening the report in the Build and View Analysis page in Oracle CRM On Demand Answers and then saving the report to another folder.

   NOTE: Use this method when you want to copy a report from My Folder to a shared folder.

■ Using the Copy/Move feature in the Manage Analyses window in Oracle CRM On Demand Answers.

   NOTE: Do not use this method to copy a report from My Folder to a shared folder.

You can also use the Copy/Move feature in the Manage Analyses window in Oracle CRM On Demand Answers to move a report from one folder to another.

The following procedure describes how to copy a report from My Folder to a shared folder.

To copy a report from My Folder to a shared folder

1 In Oracle CRM On Demand, click the Reports tab.

2 On the Reports Homepage, in the Custom Reports and Analyses section, click Design Analyses to open Oracle CRM On Demand Answers.

3 In Oracle CRM On Demand Answers, click Open Analysis.

4 In the Open Analysis dialog box, navigate to the report that you want to share, select it, and click OK.

5 In the Build and View Analysis page, click Save.

6 In the Save Analysis dialog box, navigate to the folder to which you want to copy or move the report.

7 Click OK.

The following procedure describes how to copy or move a report from one folder to another.

To copy or move a report from one folder to another through the Manage Analyses window

1 In Oracle CRM On Demand, click the Reports tab.

2 On the Reports Homepage, in the Custom Reports and Analyses section, click Design Analyses to open Oracle CRM On Demand Answers.

3 In Oracle CRM On Demand Answers, click Manage Analyses.

4 In the Manage Analyses window, in the folder row, click Copy/Move.

5 In the report directory, select the folder to which you want to copy or move the report.

6 Click Copy or Move.

Getting Started with Answers (Custom Reports)

NOTE: To create custom reports your user role must include the Manage Custom Reports privilege or the Manage Personal Reports privilege.

The Getting Started with Answers page has links for the following actions:

■ **Open Existing Analysis.** Click this link to open an existing analysis that is stored in your private folder or in the shared folder. For more information, see Managing Analyses (on page 921).

■ **Manage Analyses.** Click this link to delete or rename an existing analysis. For more information, see Managing Analyses (on page 921).

■ **Create New Analysis.** This section contains links to subject areas that form the basis of a custom report.

Creating a New Analysis (Custom Report)

The Create New Analysis section has two listings of subject areas that you can use in your report: the Analytics subject areas and the Reporting subject areas. Most reports use data from a single subject area. It is possible to create a report using data from two subject areas, but it is an advanced task.

Each subject area contains data fields (organised into dimensions) and their related metrics.

The Analytics subject areas use data that is compiled nightly. These subject areas generally have historical or trend data, or contain more complex calculations than those found in the Reports subject areas. If this is the first time you have signed in, the historical analyses do not show data until the first ETL run has completed.

The Reporting subject areas provide real-time analyses. The data in these reports can change during the working day. Reports made from Reporting subject areas have a Refresh button, so you can update them in real time. For more information about subject areas, see About Subject Areas in Reports (on page 942).

Before you begin. Do the following:

■ Make sure the data that you want to include is not already available in a prebuilt report.

■ Be familiar with the limitations of reports and reporting record types. For more information, see About Limitations in Reports (on page 937).

■ Review the information about custom reports. If you have added new fields, you can use those custom fields on a report. If you have changed the display names for fields, the new display names are used for the reports. However, if you rename record types, such as Accounts, the new names are not reflected in the reports.

   NOTE: If you selected the option to add new picklist values when importing data, those new picklist values might not be displayed in the reports until the next ETL run completes. Therefore, you might not be able to use the new picklist values as filters during that time period.

   NOTE: Custom related information fields are not exposed in Analytics Answers. You should instead use the original fields that are referred to by the custom related information fields for reporting.

To create a custom report, click one of the Analytics or Reporting subject areas. Oracle CRM On Demand Answers then guides you through the process of setting up your custom report and performing a dynamic analysis. This process consists of the following general steps:

1 Step 1: Defining Criteria (on page 1163)

   Set up columns and filters. Add filters to determine which data to include (optional but recommended). Filters restrict the data that is displayed, reducing the size of the data set and avoiding performance issues.

2 Step 2: Creating Layouts (on page 1191)

   Add charts or tables (optional) to include graphical or alternative representations of the data.

3 Step 3: Defining Prompts (Optional) (on page 1239)

   Add prompts that allow users to specify filter values when they run the report.

4 Step 4: Reviewing Reports (on page 1243)

   View the report results before you save it.

To begin creating a custom report

1 Click the Reports tab at the top of your page.

2 On the Reports Homepage, in the Custom Reports and Analyses section, click the Design Analyses Link.

Oracle CRM On Demand Answers appears in a separate page, independent of the other Oracle CRM On Demand pages.

3 Click an Analytics subject area or a Reporting subject area.

Analytics URL Reference Is Not Supported

Oracle CRM On Demand does not support using a direct Analytics URL reference either from within the Oracle CRM On Demand application or from an external embedded URL. Do not use this URL reference to embed analytics content in custom Web tabs, Web applets, or Web links because these customisations might not work after an upgrade. Until the direct Analytics URL reference is fully supported, use the custom Homepage report feature to display analytics content within the Oracle CRM On Demand application. You cannot request support for problems encountered using a direct analytics URL. Only problems that occur within the Oracle CRM On Demand application are supported.

Language Support for Picklists

Oracle CRM On Demand Answers supports the display of picklist values in your user language in addition to the company's default language. The following table lists the record types that support these picklists and the name of the picklist subfolders.   Each subfolder contains a set of picklist fields that you can use to display the picklist values in your user language.

Record Type	Historical or Real-Time	Subfolder Name
Account	Historical and Real-Time	Account Picklist Fields (User Language)
Account Relationship	Historical and Real-Time	Account Relationship Picklist Fields (User Language)
Activity	Historical and Real-Time	Activity Picklist Fields (User Language)
Assessment	Real-Time	Assessment Picklist Fields (User Language)
Asset	Historical and Real-Time	Asset Picklist Fields (User Language)
Business Plan	Real-Time	Business Plan Picklist Fields (User Language)
Campaign	Historical and Real-Time	Campaign Picklist Fields (User Language)
Custom Object 1 - 15	Real-Time	Custom Object nn Picklist Fields (User Language)

Record Type	Historical or Real-Time	Subfolder Name
Contact	Historical and Real-Time	Contact Picklist Fields (User Language)
Event	Historical	Event Picklist Fields (User Language)
Financial Plan	Real-Time	Financial Plan Picklist Fields (User Language)
Lead	Historical and Real-Time	Lead Picklist Fields (User Language)
Opportunity	Historical and Real-Time	Opportunity Picklist Fields (User Language)
Opportunity Product	Historical and Real-Time	Opportunity Product Picklist Fields (User Language)
Product	Historical and Real-Time	Product Picklist Fields (User Language)
Quota	Historical and Real-Time	Quota Picklist Fields (User Language)
Service Request	Historical and Real-Time	Service Request Picklist Fields (User Language)
Shared Address	Historical	Shared Address Picklist Fields (User Language)
Solution	Historical and Real-Time	Solution Picklist Fields (User Language)
User	Historical and Real-Time	User Picklist Fields (User Language)

The User record type does not always appear as the User dimension. Other dimension names used for the User record type are Approver, Final Approver, and Last Approved By. If a user record type is contained within another record type, then the user record type appears in the second level of the hierarchy as you would expect. However, the user-language picklist and the company picklist also appear in the second level of the hierarchy, not under the user record type.

To display the picklist values in the company language, you can continue to use the picklist fields that are under the standard dimension folders. Also the picklist fields, suffixed with the term *Code,* that were

previously available under the main folder are now available under the subfolders (such as Account Picklist Fields (Code), Activity Picklist Fields (Code), and so on) with the suffix removed from the field names. You can continue to use these language independent code (LIC) fields and the optimised version of the base picklist fields in report filters to improve query performance.

In reports, picklist values appear in the user or company selected language. However, picklist fields that do not have a value selected in the user interface are displayed as shown in the following table. The behaviour of the picklist value display depends on the type of picklist, which can be prebuilt or indexed custom.

The following table describes the behaviour of the picklist value display for historical subject areas.

Type of Picklist	Language Independent Code	Company Language Dependent Value	User Language Dependent Value
Prebuilt	Unspecified	Unspecified or Blank. If the value is set to Unspecified, then this text appears in the company selected language.	Unspecified. This text appears in the user selected language.
Indexed custom with or without custom values defined	Unspecified	Blank.	Unspecified. This text appears in the user selected language.

The following table describes the behaviour of the picklist value display for real-time subject areas.

Type of Picklist	Language Independent Code	Company Language Dependent Value	User Language Dependent Value
Prebuilt	Blank	Unspecified. This text appears in the company selected language.	Unspecified. This text appears in the user selected language.
Indexed custom with custom values defined	Blank	Unspecified. This text appears in the company selected language.	Unspecified. This text appears in the user selected language.
Indexed Custom with no custom values defined	Blank	Records are deleted.	Unspecified. This text appears in the user selected language.

About Limitations in Reports

The limitations of reports are listed in the following sections.

Custom Objects Reporting

Oracle CRM On Demand Answers provides comprehensive support for reporting custom objects. You can report on Custom Objects 1, 2, and 3 and their many-to-many relationship with accounts, contacts, opportunities, and service requests through specially dedicated subject areas. Use the Advanced Custom Objects subject area to report the relationship between Custom Objects 4-15 and other prebuilt objects including Custom Objects 1, 2, and 3. However, custom object reporting is currently supported only in real-time subject areas. It is not available in historical subject areas.

Description Text Limits

The Description text fields limit how much text can be printed in a report:

■ If the character set uses single-byte characters, the first 2,000 characters appear if the total byte size is less than 4,000.

■ If the character set uses multibyte characters, the first 1,000 characters appear if the total byte size is more than 2,000.

Maximum Number of Rows

The maximum number of records can appear as follows:

■ **Table view.** For this view the maximum number of records that can appear is 10,000. This number also controls the number of rows that can be downloaded. However, it supports up to 65,000 rows when downloading CSV files or text files.

■ **Pivot table view.** For this view the maximum number of records that can appear is 20,000, and the maximum number of populated cells (rows multiplied by columns) is 200,000. Excluded and hidden columns are not considered in this limit.

■ **Drop-down lists.** The maximum number of values that can show in drop-down lists is 1,000. This number includes the drop-down lists in filter conditions and report and dashboard prompts.

Time Limit for Query Execution

Oracle CRM On Demand Answers provides optimal performance for queries and reports while balancing the performance of Oracle CRM On Demand. To minimise the negative effect of long-running queries or run-away queries on the overall performance of Oracle CRM On Demand Answers, a time limit has been enabled for both real-time and historical reports. Queries that exceed the time limit generate a Timeout error message. For information about specific timeout limits that are applicable to your instance of Oracle CRM On Demand, contact Customer Care. For all instances, the maximum query time cannot exceed 10 minutes for Reporting (real-time) subject areas and 180 minutes for Analytics (historical) subject areas. For information on optimising query execution time, see About Report Performance (on page 1287) and Optimising Performance (see "Optimizing Performance" on page 1288).

Multi-select Picklists

Multiselect picklist (MSP) values are not supported in real-time reporting subject areas. They are supported in the historical subject areas for the following subject areas:

■ Account

- Activity

- Contact

- Dealer

- Lead

- Opportunity

- Service Request

Analytics displays a multiselect picklist field (up to 10 fields for each object) as a separate folder. Within these folders only the first 20 picklist values of the field and the concatenated MSP field value are available for reporting.

Column Filter Prompt in Combined Analyses

Column filter prompts provide general filtering of a column within a request. However, this column filter prompt is not available in combined analysis requests.

Book Visibility

The Book selector appears in the Reports and Dashboard pages and in reports embedded in record Homepages. You can use the Book selector to drill down into user books or custom books. If you have Full Visibility settings and are displaying an Analytic (historical) subject area, you can exclude subordinates or subbooks in the respective book hierarchy by clearing the Include Sub-Items check box.

The Book selector is not available for report previews. You cannot exclude sub-items from reports made from Reporting (real-time) reporting subject areas. You can clear the Include Sub-Items check box, but it has no effect on Reporting subject areas, it only affects Analytic subject areas.

NOTE: Several settings control your visibility to records in analytics. For more information, see About Visibility to Records in Analytics (on page 908).

Exchange Rates

If your company has more than one active currency, your company administrator must set up exchange rates for each currency. Changes made to exchange rates appear in reports after the nightly refresh of analytics data. A single exchange rate is determined for each month, and all transactions within the month use that rate.

Some record types have multiple date fields. Only one date field is used to determine the month's exchange rate. For asset currency conversions, the Purchase Date field determines the month used. For an opportunity, the Opportunity Close Date that is closest to the Exchange Rate Effective Date is used.

Localisation Settings

If you change your default language, the reporting elements display in the newly selected language. However, the data in reports or dashboards depends on your company's default language regardless of your chosen language.

Date Support

Oracle CRM On Demand Answers supports date analysis of metrics through the date dimension for 41 years (2000 to 2040) for companies using calendar-quarter or standard, fiscal-calendar models. For companies using custom fiscal calendar, Oracle CRM On Demand Answers can support date analysis of metrics only for the years defined in Oracle CRM On Demand. If a record is created outside this period, you can still display this record as long as it is not analysed through the date dimension.

Date dimensions are set up differently in analytic (historical) subject areas than in reporting (real-time) subject areas. In analytic subject areas there is only one date dimension (standard or canonical), and there might be one or multiple sets of metrics using different dates, so these metrics can be reported by any date within the desire range. In reporting subject areas, there are one or multiple date dimensions (role-playing) and only a single set of metrics, so these metrics can be analysed using different date dimensions.

For example, consider the Opportunity History analytic subject area, which contains one date dimension (Close Date) and two sets of metrics. The default set of metrics, Opportunity Metrics, is based on the Close Date, but there is also another set of metrics, Opportunity Metrics by Open Date, to allow analysis of opportunities by an open date. However, the Opportunities Reporting subject area contains two date dimensions: Date Opened and Close Date, and one set of metrics (Opportunity Metrics). The advantage of using the date dimension of the analytic subject area is that it allows analysis of various related metrics for the entire period using any date within the desire range in a single report.

The following table summarises the set-up of the date dimensions between analytic and reporting subject areas.

Characteristic	Analytic Subject Areas	Reporting Subject Areas
Date dimensions	One	One or multiple
Sets of metrics	One or multiple	One

Time Support

Dates and times shown in reports are displayed in the company's time zone, so that everyone using the report can view consistent data. It is possible to display dates and times in the user's time zone (for Reporting subject areas only) if the company administrator has enabled the User Time Zone Support for Reporting Subject Areas field and if this field is selected in the user's profile. Changing this setting affects only reports that you display and does not affect reports that other users display. When sharing reports, the date and time information that you see might be different from the information that others see.

User Quotas

User quotas are available for reporting in the following subject areas: Activities, Activity History, Opportunities, Opportunity History, Opportunity-Products, and Opportunity-Product History. You must be familiar with the following considerations when reporting user quotas:

- User quotas are related to your fiscal calendar definitions. If your fiscal calendar year uses 12 periods starting every July 1, then so does the user quotas. In reports, the user quota year is determined by the final period in the fiscal year. For example, if your fiscal year ends on June 30, 2011, then the user quota year 2011 is from July 1, 2010 through June 30, 2011.

- If your company changes the fiscal calendar definition, then you must delete and recreate user quotas if the quarterly and yearly roll-up of quota values for users must match the user quotas for Oracle Contact

On Demand and Oracle CRM On Demand Answers. However, the user quota relation with the fiscal year in Oracle CRM On Demand Answers is still based on the year in which the last period of the fiscal year ends.

■ User quotas are defined for the quota name, date (month or higher), and user. They are not defined at the opportunity level. If you try to report quota metrics and opportunity metrics with the opportunity dimension field, you might encounter ODBC errors. You might also encounter ODBC errors when the user quota is reported at a level of the dimension object that is lower than the defined level or the available level. For example, user quotas are defined at the month level. If you try to report at the date level, you might encounter an ODBC error.

■ User quota metrics are always generated using Manager visibility regardless of the user's visibility. Hence, it is not possible for users who are not company administrators to report user quotas along with opportunity metrics when their visibility is set to Team visibility.

■ You might experience ODBC errors if you report user quota metrics with a nonconforming dimension. For example, user quota metrics are not defined at the opportunity dimension in the Opportunity History subject area, and hence, you might experience ODBC errors if you tried to report user quota and opportunity metrics along with the opportunity dimension fields.

■ If you define more than one quota for a given year, the user quota values shown in reports is an aggregation of all quota types for that year. You must use the filter by metric feature if you want the report to show user quota values of selected quota types for that year. For example, if Service Quota and Licence Quota are two quota types for the fiscal year 2009, and you want only Service Quota to be displayed in reports when reporting opportunity revenue, then use the following filter-metric formula on the user quota value column:

```
FILTER("Quota Metric"."QUOTA VALUE" USING (Quota."QUOTA NAME" = 'Service Quota'))
```

Custom Objects 1, 2, and 3 Associations

You cannot report on the many-to-many associations between Custom Objects 1, 2, and 3 with the following objects in Oracle CRM On Demand Answers:

■ Activities

■ Assets

■ Leads

■ Products

The many-to-many relationship is implemented only for Custom Objects 1, 2, and 3 and Account, Contact, Service Request, and Opportunity in Oracle CRM On Demand Answers. This many-to-many relationship is yet to be implemented between Custom Objects 1, 2, and 3 and Activities, Assets, Leads, and Products. However, customers can report on the one-to-many relationship between these objects and Custom Objects 1, 2, and 3, using the Advanced Custom Objects subject area. You can display elements from the Activities dimension if you include an Activity metric in the report.

Currency Conversion Limits

If a currency value is entered using a currency that is not the company's default currency, then Oracle CRM On Demand Answers converts that value to the company's default currency for use in reports. Large values that are acceptable for input in one currency may exceed value limits when converted to the company default currency. When this occurs, the report generation cannot be completed.

About Subject Areas in Reports

The Getting Started with Answers page contains two categories of subject areas: Analytics and Reporting. The subject areas in the Analytics category generate reports that are historical and that show trend analyses, based on data that is refreshed nightly. The subject areas in the Reporting category provide up-to-the-second data analyses and real-time information.

Subject areas represent information pertinent to a particular area of the business, or the reporting and analysis needs of a particular audience. Subject area names correspond to the type of information that they contain, such as dimension objects (record types) and fact metrics, which the business users want to analyse. Subject area names organise and categorise this information in various folders.

Analytic Subject Areas

The following links provide detailed information on each subject area, including its business purpose, its relationship type (one-to-one, one-to-many, many-to-many, and so on), and a listing of the dimensions and metrics that are available:

- Account Addresses (see "Account Addresses Analytic Subject Area" on page 948)

- Account and Competitor History (see "Account and Competitor History Analytic Subject Area" on page 950)

- Account and Partner History (see "Account and Partner History Analytic Subject Area" on page 953)

- Account and Related Account History (see "Account and Related Account History Analytic Subject Area" on page 957)

- Account Contact History (see "Account Contact History Analytic Subject Area" on page 960)

- Account History (see "Account History Analytic Subject Area" on page 962)

- Account Team History (see "Account Team History Analytic Subject Area" on page 965)

- Activity History (see "Activity History Analytic Subject Area" on page 966)

- Asset History (see "Asset History Analytic Subject Area" on page 969)

- Call Activity History (see "Call Activity History Analytic Subject Area" on page 972)

- Campaign History (see "Campaign History Analytic Subject Area" on page 975)

- Campaign Response History (see "Campaign Response History Analytic Subject Area" on page 977)

- Contact Addresses (see "Contact Addresses Analytic Subject Area" on page 980)

- Contact History (see "Contact History Analytic Subject Area" on page 981)

- Contact Interests History (see "Contact Interests History Analytics Subject Area" on page 983)

- Contact Revenue History (see "Contact Revenue History Analytic Subject Area" on page 985)

- Contact Team History (see "Contact Team History Analytic Subject Area" on page 987)

■ Deal Registration History (see "Deal Registration History Analytic Subject Area" on page 988) (Oracle CRM On Demand Partner Relationship Management Edition only)

■ Deal Registration Product Revenue History (see "Deal Registration Product Revenue History Analytic Subject Area" on page 991) (Oracle CRM On Demand Partner Relationship Management Edition only)

■ Dealer History (see "Dealer History Analytic Subject Area" on page 994) (Oracle CRM On Demand Automotive Edition only)

■ Event History (see "Event History Analytic Subject Area" on page 995)

■ Household History (see "Household History Analytic Subject Area" on page 997) (Oracle CRM On Demand Financial Services Edition only)

■ Lead History (see "Lead History Analytic Subject Area" on page 1000)

■ MDF Request History (see "MDF Request History Analytic Subject Area" on page 1002) (Oracle CRM On Demand Partner Relationship Management Edition only)

■ Opportunity and Competitor History (see "Opportunity and Competitor History Analytic Subject Area" on page 1006)

■ Opportunity and Partner History (see "Opportunity and Partner History Analytic Subject Area" on page 1009)

■ Opportunity Contact History (see "Opportunity Contact History Analytic Subject Area" on page 1012)

■ Opportunity History (see "Opportunity History Analytic Subject Area" on page 1013)

■ Opportunity Product Revenue History (see "Opportunity Product Revenue History Analytic Subject Area" on page 1016)

■ Opportunity Team History (see "Opportunity Team History Analytic Subject Area" on page 1018)

■ Partner History (see "Partner History Analytic Subject Area" on page 1020) (Oracle CRM On Demand Partner Relationship Management Edition only)

■ Pipeline History (see "Pipeline History Analytic Subject Area" on page 1022)

■ Portfolio History (see "Portfolio History Analytic Subject Area" on page 1024) (Oracle CRM On Demand Financial Services Edition only)

■ Product History (see "Product History Analytic Subject Area" on page 1026)

■ Quotes History (see "Quote History Analytic Subject Area" on page 1029)

■ Sales Stage History (see "Sales Stage History Analytic Subject Area" on page 1030)

■ Service Request History (see "Service Request History Analytic Subject Area" on page 1032)

■ Shared Address History

■ Solutions History (see "Solutions History Analytic Subject Area" on page 1037)

■ Special Pricing Product History (see "Special Pricing Product History Analytic Subject Area" on page 1039)

■ Usage Tracking Analysis (see "Usage Tracking Analysis Analytic Subject Area" on page 1043)

Reporting Subject Areas

The following links provide detailed information on each subject area, including its business purpose, its relationship type (one-to-one, one-to-many, many-to-many, and so on), and a listing of the dimensions and metrics that are available:

■ Account Contacts (see "Account Contacts Reporting Subject Area" on page 1049)

■ Account Revenues (see "Account Revenues Reporting Subject Area" on page 1050)

■ Accounts (see "Accounts Reporting Subject Area" on page 1052)

■ Accounts and Competitors (see "Accounts and Competitors Reporting Subject Area" on page 1055)

■ Accounts and Partners (see "Accounts and Partners Reporting Subject Area" on page 1058)

■ Accounts and Related Accounts (see "Accounts and Related Accounts Reporting Subject Area" on page 1062)

■ Activities (see "Activities Reporting Subject Area" on page 1065)

■ Advanced Custom Objects (see "Advanced Custom Objects Reporting Subject Area" on page 1067)

■ Assessments (see "Assessments Reporting Subject Area" on page 1083)

■ Assets (see "Assets Reporting Subject Area" on page 1086)

■ Business Planning (see "Business Planning Reporting Subject Area" on page 1088)

■ Campaigns (see "Campaigns Reporting Subject Area" on page 1091)

■ Contact Relationships (see "Contact Relationships Reporting Subject Area" on page 1094)

■ Contacts (see "Contacts Reporting Subject Area" on page 1096)

■ Custom Object 1 and Accounts (see "Custom Objects and Accounts Reporting Subject Area" on page 1098)

■ Custom Object 1 and Contacts (see "Custom Objects and Contacts Reporting Subject Area" on page 1101)

■ Custom Object 1 and Opportunities (see "Custom Objects and Opportunities Reporting Subject Area" on page 1103)

■ Custom Object 1 and Service Requests (see "Custom Objects and Service Requests Reporting Subject Area" on page 1106)

■ Custom Object 1s (see "Custom Objects Reporting Subject Area" on page 1108)

■ Custom Object 2 and Accounts (see "Custom Objects and Accounts Reporting Subject Area" on page 1098)

■ Custom Object 2 and Contacts (see "Custom Objects and Contacts Reporting Subject Area" on page 1101)

■ Custom Object 2 and Opportunities (see "Custom Objects and Opportunities Reporting Subject Area" on page 1103)

■ Custom Object 2 and Service Requests (see "Custom Objects and Service Requests Reporting Subject Area" on page 1106)

■ Custom Object 2s (see "Custom Objects Reporting Subject Area" on page 1108)

■ Custom Object 3 and Accounts (see "Custom Objects and Accounts Reporting Subject Area" on page 1098)

■ Custom Object 3 and Contacts (see "Custom Objects and Contacts Reporting Subject Area" on page 1101)

■ Custom Object 3 and Opportunities (see "Custom Objects and Opportunities Reporting Subject Area" on page 1103)

■ Custom Object 3 and Service Requests (see "Custom Objects and Service Requests Reporting Subject Area" on page 1106)

■ Custom Object 3s (see "Custom Objects Reporting Subject Area" on page 1108)

■ Events (see "Events Reporting Subject Area" on page 1111)

■ Forecasts (see "Forecasts Reporting Subject Area" on page 1113)

■ Households (see "Households Reporting Subject Area" on page 1118) (Oracle CRM On Demand Financial Services Edition only)

■ Leads (see "Leads Reporting Subject Area" on page 1122)

■ Opportunities Subject Area (see "Opportunities Reporting Subject Area" on page 1125)

■ Opportunities and Competitors (see "Opportunities and Competitors Reporting Subject Area" on page 1128)

■ Opportunities and Partners (see "Opportunities and Partners Reporting Subject Area" on page 1131)

■ Opportunity Contact (see "Opportunity Contacts Reporting Subject Area" on page 1134)

■ Opportunity-Products (see "Opportunity Product Revenues Reporting Subject Area" on page 1135)

■ Opportunity Team (see "Opportunity Team Reporting Subject Area" on page 1137)

■ Orders (see "Orders Reporting Subject Area" on page 1138)

■ Partners (see "Partners Reporting Subject Area" on page 1141) (Oracle CRM On Demand Partner Relationship Management Edition only)

■ Personalised Content Delivery (see "Personalised Content Delivery Reporting Subject Area" on page 1142) (Oracle CRM On Demand Life Sciences Edition only)

■ Quotes (see "Quotes Reporting Subject Area" on page 1146)

■ Service Requests (see "Service Requests Reporting Subject Area" on page 1148)

■ Shared Activities (see "Shared Activities Reporting Subject Area" on page 1150)

■ Solutions

■ Special Pricing Product (see "Special Pricing Product History Analytic Subject Area" on page 1039)

■ Vehicles (see "Vehicles Reporting Subject Area" on page 1156)

The following table shows the five types of subject areas that Oracle CRM On Demand uses.

Subject Area Type	Description
Simple	This subject area type consists of a single fact table that contains all the metrics of the driving record type. The report always provides a result that can be understood. In other words, whatever combination of attributes and metrics you select for your report, the report always returns a result that reflects the data in Oracle CRM On Demand.

Subject Area Type	Description
	Simple subject areas are appropriate when you want to report on a single set of metrics. They allow you to drill down on the detail in transactional data.
Multi-fact	This subject area type consists of two or more fact tables at different dimensional levels. The fact tables are joined by conformed (shared) dimensions. Multi-fact allows you to perform combined fact analysis.
	Not all dimensions have a relationship with all the fact tables. For example, the quota metric table has a relationship only with the Owned By User, Quota, and the Date dimensions. These dimensions are also called conforming dimensions in dimensional-modelling terminology. In a multi-fact subject area, if you select attributes from a dimension and a metric from a fact, and they have no direct relationship with each other, then your report will not work correctly. In some cases, the metric field is empty, or an error appears in the report.
	Multi-fact subject areas are appropriate when you want to report on multiple, yet related, sets of metrics.
Summary	This subject area type consists of a single summarised fact table. It allows you to perform summary analysis of metrics using a key dimension. It is called *summary*, because it provides summary information for a specific dimension or record type in Oracle CRM On Demand analytics, such as the Account record type. From this subject area, you can obtain all the CRM functionality related metrics, such as sales revenue, service request, activity, and lead metrics.
	Summary subject areas are appropriate when you want summaries of metrics, using a key dimension, but without analysing these metrics, using other dimensions.
Many-to-Many (M:M)	This subject area type represents both many-to-many and one-to-many relationships between two record types. It contains a fact table but it might also be a subject area without a fact table.
	The one-to-many relationship between Custom Object 1 and Account can also be reported from this subject area. However, if you want to report on the many-to-one relationship between Account and Custom Object 1, then do not use this subject area. The Custom Object 1 subject area, which is a simple design subject area, allows you to report on all of the many-to-one relationships between all the standard record types and Custom Object 1.
	The Many-to-Many subject areas are the only ones that you can use to report on the many-to-many and one-to-many relationships between record types.
Federated	This subject area type brings all the dimension and metric folders under a single subject area. It allows you to create reports on all record types and their associated record types, and so there is no single driving record type in this subject area type. You can report on both one-to-many and many-to-one relationships between the new custom objects (Custom Object 4-Custom Object 12) and other record types, but not on

Subject Area Type	Description
	many-to-many relationships. The Advanced Custom Objects subject area is the only one that belongs to this subject area type. It is also the only one that allows you to report on the relationship between Custom Object 4-Custom Object 15 with other standard objects, including Custom Object 1, 2, and 3. All types of relationships can be reported on, using this subject area, except the many-to-many relationship.

The first four types of subject areas mentioned (Simple, Multi-Fact, Summary, and Many-to-Many) are standard subject areas. The fifth type of subject area is a federated subject area for new custom objects.

Standard Subject Areas

Standard subject areas are intended to report on the relationship among standard record types, including Custom Object 1, 2, and 3. Standard record types and Custom Objects 1, 2, and 3 can have the following relationships:

■ One-to-many

■ Many-to-one

■ Many-to-many

Oracle CRM On Demand provides dedicated subject areas that allow the reporting of a many-to-one relationship between a standard record type and other record types. For example, the Opportunities subject area allows the reporting of an opportunity record type's relationship with other record types. Dedicated subject areas also allow the reporting of a many-to-many relationship between two record types. For example, the Opportunity and Partner History subject area allows the reporting of a many-to-many relationship between opportunity and partner record types.

Federated Subject Area

The Federated subject area type allows reporting of Custom Object 4 to Custom Object 15 with other standard objects, including Custom Object 1, 2, and 3. The Advanced Custom Objects subject area is an exclusive subject area of this type, included in this release, which unites the reporting of custom objects and their associated objects under a single subject area.

This approach provides more complete functionality in terms of record types and their related record types. The concept of a single driving record type is no longer applied. The lack of a driving record type means that you must always add a default metric to the report. Because a federated subject area does not have a single driving object, the report must always contain a metric in order to choose a relationship path among objects. In non-Federated subject areas you do not need to choose a metric because the relationship is defined already in the repository using an implicit fact metric.

The Advanced Custom Object subject area provides access to all of the related record type metrics. From this subject area, you can build a summary report for all the related metrics, including all the record types in Oracle CRM On Demand.

With the Advanced Custom Objects subject area, you can build reports that show the one-to-many and many-to-many relationships for all record types. In the many-to-many design, you must use the Account and Custom Object 1 subject area to report on the one-to-many relationship, and you must use the Custom Object

1s subject area to report on the one-to-many relationship between other record types and Custom Object 1. By using the Advanced Custom Object subject area, you can have access to both types of relationships. However, a many-to-many report is not available in this subject area.

The following table shows the subject area for the new custom objects.

Subject Area Name	Subject Area Type
Custom Object Subject Area	
Advanced Custom Objects	Advanced or Federated

Record Type Renaming in Analytics

Oracle provides record type renaming in analytics for all standard record types. Company administrators can rename record types in Oracle CRM On Demand. These new names are reflected in the analytics part of Oracle CRM On Demand. The renamed record types appear with their new names in subject areas, reports, and dashboards. For example, if a company administrator changes the account record type name to *Physician* in Oracle CRM On Demand, then the word *Account* is replaced in all of the answers and subject areas. So, the subject area *Account Address* becomes *Physician Address.* The subject area *Account Metrics* becomes *Physician Metrics,* and so on. However, record type renaming is currently not supported for report and dashboard names.

Row_ID and Object ID

For each record type in a subject area (such as account, activity, asset, and so on) the Row_ID field in the database is mapped to a field named <object> ID, for example, one of the following: Account ID, Lead ID, Service Request ID, and so on.

Account Addresses Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and addresses. In other subject areas, it is possible to report only the primary address of an account. However, this subject area allows the reporting of all addresses of an account along with their custom fields as well as an address shared by multiple accounts. This subject area has no metrics.

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics.*

Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Relationship Type

Many-to-many

Dimensions

This subject area offers the following dimensions:

■ Account

■ Address

Metrics

None

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

The Account Address Custom Fields folder is mapped to only the custom fields of the Account Addresses. If a shared address is associated to an account, only the custom fields added through the Edit option to the account addresses are available for reporting, not the custom fields of the shared address.

Account and Competitor History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and competitor accounts. This subject area is almost identical to the account subject areas. The only difference is that it includes the competitor dimension, which has a many-to-many relationship with the account record type. This subject area allows you to create reports to show all the competitors for an account. Because this subject area represents the many-to-many relationship between accounts and competitor accounts, accounts that do not have an association with at least one competitor account cannot be reported using this subject area. The complete attributes that define the competitor account relationship, and which are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*.

Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

■ Campaign

Dimensions

This subject area has the following dimensions:

■ Account

■ Account Competitor

■ Campaign

■ Date

■ Owned By User

- Relationship Contact
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
  - Account Custom Metrics
  - Number (#) of Accounts
  - Number (#) of Accounts with Opportunities
  - Number (#) of Activities
  - Number (#) of Contacts
  - Number (#) of Leads
  - Number (#) of Archived Leads
  - Number (#) of Qualified Leads
  - Number (#) of Rejected Leads
  - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
  - Number (#) of Leads Resulting in Lost Opportunity
  - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
  - Number (#) of SRs
  - Number (#) of Cancelled SRs
  - Number (#) of Closed SRs
  - Number (#) of Open SRs
  - Number (#) of Pending SRs
  - Number (#) of Opportunities
  - Number (#) of Wins
  - Potential Revenue
  - Potential Revenue (000)
  - Average (Avg) Potential Revenue
  - Average (Avg) Open SR Age
  - Average (Avg) Days to Close SR
  - Average (Avg) Minutes to Close SRs
  - Average (Avg) Open SR Age (Minutes)

- Average (Avg) Days to Close Opportunity (Definition: The total number of days to close an opportunity divided by the number of wins.)

- Closed Revenue

- Closed Revenue (000)

- Average (Avg) Closed Revenue

- Revenue

- Revenue (000)

- Product Closed Revenue

- Average (Avg) Revenue

- Revenue

- Product Revenue (000)

- Product Closed Revenue (000)

Usage Notes

This subject area is one of a group of related subject areas. All the subject areas in this group have the same metrics and share most of the same dimensions. The only difference between them is that the first dimension in the dimension list is specific to the subject area. The subject areas in this group are as follows:

- Account and Competitor History

- Account and Partner History

- Account and Related Account History

The Account dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Account and Partner History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and partner accounts. This subject area is almost identical to the account subject areas. The only difference is that it includes the partner dimension, which has a many-to-many relationship with the account record type. This subject area allows you to create reports to show all the partners for an account. Because this subject area represents the many-to-many relationship between accounts and partner accounts, accounts that do not have an association with at least one partner account cannot be reported using this subject area. The attributes that define the partner account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Revenue	All optimised fields
Service Request	All optimised fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Campaign

Dimensions

This subject area has the following dimensions:

- Account
- Account Partner
- Campaign
- Date
- Owned By User
- Relationship Contact
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
    - Account Custom Metrics
    - Number (#) of Accounts
    - Number (#) of Accounts with Opportunities
    - Number (#) of Activities
    - Number (#) of Contacts
    - Number (#) of Leads
    - Number (#) of Archived Leads
    - Number (#) of Qualified Leads
    - Number (#) of Rejected Leads

■ Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)

■ Number (#) of Leads Resulting in Lost Opportunity

■ Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)

■ Number (#) of SRs

■ Number (#) of Cancelled SRs

■ Number (#) of Closed SRs

■ Number (#) of Open SRs

■ Number (#) of Pending SRs

■ Number (#) of Opportunities

■ Number (#) of Wins

■ Potential Revenue

■ Potential Revenue (000)

■ Average (Avg) Potential Revenue

■ Avg Open SR Age

■ Avg Days to Close SR

■ Avg Minutes to Close SRs

■ Avg Open SR Age (Minutes)

■ Avg Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)

■ Closed Revenue

■ Closed Revenue (000)

■ Avg Closed Revenue

■ Revenue

■ Revenue (000)

■ Product Closed Revenue

■ Avg Revenue

■ Revenue

■ Product Revenue (000)

■ Product Closed Revenue (000)

Usage Notes

This subject area is one of a group of related subject areas. All the subject areas in this group have the same metrics and share most of the same dimensions. The only difference between them is that the first dimension in the dimension list is specific to the subject area. The subject areas in this group are as follows:

- Account and Competitor History

- Account and Partner History

- Account and Related Account History

The Account dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Account and Related Account History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and related accounts. This subject area is almost identical to the account subject areas. The only difference is that it includes the related account dimension, which has a many-to-many relationship with the account record type. This subject area allows you to create reports to show all the related accounts for an account. Because this subject area represents the many-to-many relationship between accounts and related accounts, the accounts that do not have an association with at least one related account cannot be reported using this subject area. The complete attributes that define the related account relationship that are available for reporting include the following:

- Primary Contact

- Role

- Reverse Role

- Start Date

- End Date

- Strengths

- Weaknesses

- Comments

Relationship Type

Many-to-many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

■ Campaign

Dimensions

This subject area has the following dimensions:

■ Account

■ Campaign

- Date

- Owned By User

- Related Account

- Relationship Contact

- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics

    - Account Custom Metrics

    - Number (#) of Accounts

    - Number (#) of Accounts with Opportunities

    - Number (#) of Activities

    - Number (#) of Contacts

    - Number (#) of Leads

    - Number (#) of Archived Leads

    - umber (#) of Qualified Leads

    - Number (#) of Rejected Leads

    - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)

    - Number (#) of Leads Resulting in Lost Opportunity

    - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)

    - Number (#) of SRs

    - Number (#) of Cancelled SRs

    - Number (#) of Closed SRs

    - Number (#) of Open SRs

    - Number (#) of Pending SRs

    - Number (#) of Opportunities

    - Number (#) of Wins

    - Potential Revenue

    - Potential Revenue (000)

    - Average (Avg) Potential Revenue

    - Avg Open SR Age

- Avg Days to Close SR

- Avg Minutes to Close SRs

- Avg Open SR Age (Minutes)

- Avg Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)

- Closed Revenue

- Closed Revenue (000)

- Avg Closed Revenue

- Revenue

- Revenue (000)

- Product Closed Revenue

- Avg Revenue

- Revenue

- Product Revenue (000)

- Product Closed Revenue (000)

Usage Notes

This subject area is one of a group of related subject areas. All the subject areas in this group have the same metrics and share most of the same dimensions. The only difference between them is that the first dimension in the dimension list is specific to the subject area. The subject areas in this group are as follows:

- Account and Competitor History

- Account and Partner History

- Account and Related Account History

The Account dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Account Contact History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and contacts. You can use it to report on all contacts associated with an account or a contact that is shared by multiple accounts.

You cannot use this subject area to report on accounts that are not associated with any contact, or to report on contacts that are not linked to an account. This subject area has no metrics.

Relationship Type

Many-to-many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

■ Account

■ Contact

Metrics

None

Usage Notes

The Account and Contact dimensions include a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Account History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides a summary view of a company's important operating metrics for its accounts. The account record type is the record type that you want to analyse. You can use the account record type to answer questions about account performance: Which companies have the highest number of service requests? Which companies have the largest number of opportunities? This subject area allows you to group and roll up these metrics at any level by account, account territory, and date dimensions. A deeper analysis involving other business areas requires the use of other subject areas.

Relationship Type

Summary

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Campaign

Dimensions

This subject area has the following dimensions:

- Account
- Campaign
- Date
- Owned By User
- Principal Partner Account
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
    - Account Custom Metrics
    - Number (#) of Accounts

- Number (#) of Accounts with Opportunities

- Number (#) of Activities

- Number (#) of Contacts

- Number (#) of Leads

- Number (#) of Archived Leads

- Number (#) of Qualified Leads

- Number (#) of Rejected Leads

- Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)

- Number (#) of Leads Resulting in Lost Opportunity

- Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)

- Number (#) of SRs

- Number (#) of Cancelled SRs

- Number (#) of Closed SRs

- Number (#) of Open SRs

- Number (#) of Pending SRs

- Number (#) of Opportunities

- Number (#) of Wins

- Potential Revenue

- Potential Revenue (000)

- Average (Avg) Potential Revenue

- Avg Open SR Age

- Avg Days to Close SR

- Avg Minutes to Close SRs

- Avg Open SR Age (Minutes)

- Avg Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)

- Closed Revenue

- Closed Revenue (000)

- Avg Closed Revenue

- Revenue

- Revenue (000)

- Product Closed Revenue

- Avg Revenue

- Revenue

- Product Revenue (000)

- Product Closed Revenue (000)

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Account Team History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and team users. Because it is possible to associate an account with various team members in Oracle CRM On Demand, you can use this subject area to create a list all team members associated with an account or all accounts where a user is added as a team member. You cannot use this subject area to report on accounts not associated with any user or to report on users not linked to an account. This subject area has no metrics.

Relationship Type

Many-to-many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Account
- Account Team
- Team Member

Metrics

None

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Activity History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyse a broad set of activity metrics by activity, account, opportunity, lead, campaign, contact, service request, and date dimensions. Because this subject area represents every single activity event and interaction in connection with these record types, this subject area is at the lowest possible level, which means the activity fact table that determines this subject area might be the largest. This subject area allows you to roll up and analyse activity metrics using the broadest set of dimensions. This subject area consists of two or more fact tables, which allows the reporting of user quotas in relation to activity metrics.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type

field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Campaign
- Lead

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Campaign
- Contact
- Date
- Dealer
- Event
- Lead
- Opportunity
- Owned By User
- Quota
- Service Request

Metrics

The complete list of metrics for this subject area is as follows:

- Activity Metrics
  - Activity Custom Metrics
  - Activity Metrics by Created Date
    - Number (#) of Activities (Created Date)
    - Number (#) of Appointments (Created Date)
    - Number (#) of Closed Activities (Created Date)
    - Number (#) of Open Activities (Created Date)
    - Number (#) of Tasks (Created Date)
  - Activity Metrics by Other Dates

- Number (#) of Appointments (End Date)

- Number (#) of Appointments (Start Date)

- Number (#) of Tasks (Due Date)

- Number (#) of Accounts with Activities

- Number (#) of Activities

- Number (#) of Appointments Scheduled

- Number (#) of Calls Dialled

- Number (#) of Calls Reached

- Number (#) of Closed Activities

- Number (#) of Open Activities

- Quota Metrics

  - Quota Value

Usage Notes

The Account, Activity, and Service Request dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

User Time Zone Enabled Fields

Normally, all times included in Analytic subject area reports display the company's time zone to ensure consistent time information no matter who generates the reports. The Activity dimension includes the following fields:

- End Time

- End Time User Time Zone

- Start Time

- Start Time User Time Zone

The End Time and Start Time fields report the activity time in the company's time zone. The End Time User Time Zone and Start Time User Time Zone fields report the same information as the standard fields do but in the user's local time zone.

Asset History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyse asset metrics by account, asset, product, and user dimensions. It allows you to track assets and products sold to a customer or company. This subject area is one of the rare subject areas where the visibility to asset records is based on the visibility of the associated account records.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Account

- Asset

- Date

- Owned By User

- Product Category

- Product

Metrics

The complete list of metrics for this subject area is as follows:

- Asset Metrics

  - Asset Metrics by Purchase Date

    - Number (#) of Assets

    - Purchase Price

    - Quantity

    - Average (Avg) Purchase Price

    - Average (Avg) Quantity

  - Asset Metrics by Ship Date

    - Number (#) of Assets

    - Purchase Price

    - Quantity

    - Average (Avg) Purchase Price

    - Average (Avg) Quantity

  - Number (#) of Assets

  - Purchase Price

  - Quantity

  - Average (Avg) Purchase Price

  - Average (Avg) Quantity

Usage Notes

You can analyse the Asset metrics by the Owned By User dimension. The Account dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Call Activity History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

The Call Activity History subject area enables sales managers and sales representatives to analyse call activity data by account, contact, activity, owner, product, product category, and date. Unlike the Activity History subject area, the Call Activity History subject area's metrics are based on the Life Sciences record types related to the activity including: Products Detailed, Samples Dropped, Sample Requests, Sample Request Items, and Promotional Items Dropped. This means that activities that do not have records for one or more of these related child record types cannot be reported on using this subject area.

You can use the Product Category dimension to summarise call activity metrics for different levels of a product hierarchy, such as brand, submarket, and market.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Campaign

Dimensions

This subject area has the following dimensions:

- Account
- Contact
- Call Activity
- Campaign
- Contact
- Date
- Opportunity
- Owned By user
- Product
- Product Category
- Products Detailed
- Sample Request
- Samples Dropped

Metrics

The complete list of metrics for this subject area is as follows:

- Call Activity Metrics

- Products Detailed Custom Metrics
    - Indexed Currency
    - Indexed Number
    - Average (Avg) Indexed Currency
    - Average (Avg) Indexed Number
- Sample Request Custom Metrics
- Samples Dropped Custom Metrics
    - Indexed Currency
    - Indexed Number
    - Average (Avg) Indexed Currency
    - Average (Avg) Indexed Number
- Number (#) of Accounts
- Number (#) of Call Activities
- Number (#) of Call Details by Product
- Number (#) of Call Products Detailed
- Number (#) of Call Promotional Items Dropped
- Number (#) of Call Sample Request Items
- Number (#) of Call Sample Requests
- Number (#) of Call Samples Dropped
- Number (#) of Contacts
- Number (#) of Promotional Items Dropped
- Number (#) of Sample Request Items
- Number (#) of Samples Dropped

Usage Notes

The Account and Contact dimensions include a Book hierarchy, which enables you to analyse metrics and related attributes at any level. You can report on attendee call, account call, and professional call records and their associated metrics.

The Number (#) of Contacts shows the quantity of distinct primary contacts, not all the contacts associated with the call.

Campaign History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area enables the comprehensive analysis of campaigns by campaign, user, and date dimensions. It allows you to analyse campaign results, performance, and the return on investment (ROI). It also contains metrics to help resolve problems in achieving campaign goals and optimising future campaigns.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics.* Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Revenue	All optimised fields
Service Request	All optimised fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Campaigns

Dimensions

This subject area has the following dimensions:

- Campaigns
- Owned By User
- Date

Metrics

The complete list of metrics for this subject area is as follows:

- Metrics
  - Number (#) of Campaigns
  - Number (#) of Campaigns Active
  - Number (#) of Campaigns Completed
  - Number (#) of Campaigns Planned
  - Number (#) of Leads
  - Number (#) of Opportunities
  - Number (#) of Wins
  - Number (#) of Accounts for Campaign
  - Number (#) of Contacts for Campaign
  - Percentage (%) of Budget (Definition: The cost multiplied by 100, then divided by the budgeted cost.)
  - Percentage (%) of Lead Target Achieved (Definition: The number of leads multiplied by 100, then divided by the lead target.)
  - Percentage (%) of Revenue Target Achieved (Definition: The closed revenue multiplied by 10, then divided by the revenue target.)

- Average (Avg) Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)

- Avg Days to Convert Lead (Definition: The number of days between the lead-created date and lead-converted date divided by the number of leads converted to opportunities.)

- Cost per Closed Sale (Definition: The cost divided by the number of wins.)

- Avg Cost Per Closed Sale (Definition: The average cost divided by the number of wins.)

- Cost per Lead (Definition: The cost divided by the number of leads.)

- Avg Cost Per Lead (Definition: The average cost divided by the number of leads.)

- Lead Conversion Rate (Definition: The leads who became customers, expressed as a percentage.)

- Revenue

- Closed Revenue

- Avg Closed Revenue

- Opportunity Win Rate (Definition: The total number of win opportunities, divided by the total number of won and lost opportunities.)

- Return on investment (ROI)

Usage Notes

None

Campaign Response History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

NOTE: Campaign response data is limited to data from Oracle Email Marketing On Demand campaigns only. It does not display response data for campaigns where the data has been entered through the Oracle CRM On Demand user interface. Oracle Email Marketing On Demand has been discontinued and no new campaigns can be started. You can continue to use this subject area to report on existing campaign data.

Business Purpose

This subject area allows you to analyse campaign information, including response data from Oracle Email Marketing On Demand campaigns. It complements the campaign subject areas, which provide the campaign performance data. It allows companies to analyse the response to an Oracle Email Marketing On Demand campaign by answering the following questions: How many people received the campaign? How many of them responded? How did they respond? How long did it take them to respond? and so on.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

■ Campaign

Dimensions

This subject area has the following dimensions:

■ Account

■ Campaign

■ Campaign Recipient

■ Campaign Response

■ Date

Metrics

The complete list of metrics for this subject area is as follows:

■ Metrics

■ Number (#) of Recipients. This metric is based on the campaign recipient field.

■ Number (#) of Hard Bounces. This metric is based on the response types of: Address Moved, Bad Address, and Bad Sender.

■ Number (#) of Soft Bounces. This metric is based on the response types of: Mailbox Problem, System Problem, Network Problem, Protocol Problem, Security Problem, Message Too Large, Vacation, and Last Resort.

■ Number (#) of Responders. This metric is based on the delivery status.

■ Number (#) of Responses. This metric is based on the delivery status.

■ Number (#) of Open Responses. This metric is based on the response type of Message Opened.

■ Number (#) of Click Through. This metric is based on the response type of Click-Through.

■ Number (#) of Opt Ins. This metric is based on the response type of Opt-In to List.

■ Number (#) of Opt Outs. This metric is based on the response type of Opt-Out from List.

■ Number (#) of Global Opt Ins. This metric is based on the response type of Global Opt-In.

■ Number (#) of Global Opt Outs. This metric is based on the response type of Global Opt-Out.

■ Average (Avg) Days to Respond. This metric is based on the delivery status.

Usage Notes

The campaign response metrics are based either on the delivery status or the response type. For example, the number of hard bounces is based on the response type, not the delivery status, even though there is a delivery status of Hard Bounce.

The Account dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Contact Addresses Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between contacts and addresses. In other subject areas, it is possible to report on only the primary address of a contact. However, this subject area allows you to report on all addresses of a contact as well as an address that is shared by multiple contacts. This subject area does not have any fact tables or any metrics.

Relationship Type

Many-to-many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type

Record Type	Oracle CRM On Demand Answers Coverage
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Contact
- Address

Metrics

None

Usage Notes

The Contact dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Contact History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

You can use this subject area to report on contact metrics by contact, account, campaign, owned by user, and date dimensions. The level of detail of this subject area is one row for each contact created in Oracle CRM On Demand. This subject area allows you to quickly answer the following questions: Who are the top ten employees with the largest number of contacts? Which accounts do not have any contacts? Which are the largest campaigns by contacts? How many prospects does a particular contact bring to my company?

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

◼ Campaign

Dimensions

This subject area has the following dimensions:

◼ Account

◼ Campaign

- Contact

- Date

- Owned By User

Metrics

The complete list of metrics for this subject area is as follows:

- Contact Metrics

    - Number (#) of Clients

    - Number (#) of Contacts

    - Number (#) of Prospects

Usage Notes

The Account and Contact dimensions include a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Contact Interests History Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

The Contact Interests History Analytics subject area enables you to generate reports about contacts' interests for the Contact dimension. This report enables advisors and their managers to determine their clients' interests and hobbies and to select meaningful gifts for their clients, which are based on those interests. They can also use this information to host relevant appreciation events, such as golf tournaments. In this way, advisors can deepen their relationships with their clients as well as meet their clients' friends and families. These events might generate new business.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the

optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Contact
- Owned By User
- Date
- Contact Interests

Metrics

The complete list of metrics for this subject area is as follows:

- Contact Interests Metrics
    - Number (#) of Contact Interests

Usage Notes

The Contact dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Contact Revenue History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

The Contact Revenue History subject area enables you to analyse product revenue data by contact, product, product category, owner and date. The metrics in this subject area include the following:

- Number (#) of products

- Average Number (Avg #) of Products

- Avg Revenue

It allows users to create reports showing different types of product revenue over time, such as projected revenue compared to actual. This comparison enables users to better understand the revenue potential and sales of products by contacts. You use the Product Category dimension to summarise Contact Revenue metrics for different levels of a product hierarchy, such as brand, submarket, and market.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Contact
- Product Category
- Product
- Contact Revenue
- Date
- Owned By User

Metrics

The complete list of metrics for this subject area is as follows:

- Contact Revenue Metrics
  - Avg Number (#) of Products
  - Number (#) of Products
  - Avg Revenue

Usage Notes

The Contact dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Contact Team History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to report on the many-to-many relationship between contacts and team members. You can use it to list all team members associated with a contact and all contacts where a user is added as a team member. You cannot use this subject area to report on contacts who are not associated with any user or to report on users not linked to a contact. This subject area does not have any fact tables nor any metrics.

Relationship Type

Many-to-many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type

Record Type	Oracle CRM On Demand Answers Coverage
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Contact
- Team Member

Metrics

None

Usage Notes

The Contact dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Deal Registration History Analytic Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Partner Relationship Management Edition.

Business Purpose

The Deal Registration reporting subject area provides information on how your partners are using deal registrations and the effect that deal registration has on your business. For example, you can do the following:

- Create a report to show the amount of revenue expected from deal registrations.
- Determine the average number of days that it takes to approve a deal registration.
- Determine the percentage of opportunities that has been registered.
- Report on the number of deal registrations that has resulted in new opportunities.
- Determine the average validity period of deal registrations.
- Report on the quarterly change in revenue from deal registrations.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

■ Associated Customer

■ Associated Opportunity

■ Contact

■ Date

■ Deal Registration

- Final Approver

- Owned By User

- Principal Partner Account

Non-Close Date Metrics

The following metrics are not based on the Close Date of the registrations:

- Deal Registration Metrics

    - Deal Registration Custom Metrics

    - Number (#) of Deal Registrations

    - Number (#) of Deal Registrations with Opportunities

    - Number (#) of Deal Registrations without Opportunities

    - Number (#) of Deal Registrations for new Opportunities

    - Number (#) of Deal Registrations for existing Customers

    - Number (#) of Deal Registrations for new Customers

    - Number (#) of Deal Registrations converted to Opportunity

    - Number (#) of Deal Registrations pending approval

    - Number (#) of approved Deal Registrations

    - Number (#) of expired Deal Registrations

    - Number (#) of days pending approval

    - Average (Avg) Days to approval

    - Avg validity period (in days)

    - Percentage (%) of Deal Registrations Approved

    - Percentage (%) of Deal Registrations Rejected

    - Percentage (%) of Deal Registrations Returned

    - Percentage (%) of Deal Registrations converted to Opportunity

    - Number (#) of Deal Registrations resulting in wins

Close Date Metrics

The following metrics are based on the Close Date of the registrations:

- Deal Registration Metrics

    - Total Deal Size on open Deal Registrations

    - Avg Total Deal Size on open Deal Registrations

    - Total Revenue from Deal Registrations

- Avg Total Revenue from Deal Registrations

- Quarter Ago Total Revenue from Deal Registrations

- Avg Quarter Ago Total Revenue from Deal Registrations

Usage Notes

The Associated Contact dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Deal Registration Product Revenue History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

The Deal Registration Product Revenue History subject area helps you identify trends and tendencies around your deal registration line items. It enables you to create basic queries involving Deal Registration Product Revenue metrics using core dimension attributes. It can help you answer questions such as:

- What is the maximum revenue expected from a single product on a single deal registration?

- Considering only open deal registrations, what is the average revenue for each deal registration (as calculated from revenue records)?

- How many unique products are referred to on all deal registrations (irrespective of the approval status)?

- What are the top products for all open deal registrations: by total quantity, by total revenue, by occurrence, by average quantity for each deal registration, or by average revenue for each deal registration?

- List all open deal registrations that have at least one product revenue line item with either zero or null quantity or zero or null price.

- What were the top products a quarter ago: by quantity, by revenue, by occurrence, by average quantity per deal registration, or by average revenue for each deal registration?

Relationship Type

One-to-many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised*

Custom Metrics, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Associated Contact
- Associated Customer
- Associated Opportunity
- Date (based on the Close Date of the Deal Registration)
- Deal Registration
- Deal Registration Product Revenue
- Principal Partner Account (available only in Oracle CRM On Demand Partner Relationship Management Edition)
- Product
- Product Category

Metrics

The subject area has the following metrics:

- Deal Registration Product Revenue Metrics

    - Deal Registration Product Revenue Custom Metrics:

        - Avg Indexed Currency

        - Avg Indexed Number

        - Indexed Currency

        - Indexed Number

    - Number (#) of Products

    - Number (#) of Products on Deal Registrations without Opportunities

    - Number (#) of Products on Open Deal Registrations

    - Average Number (Avg #) of Products on Deal Registrations without Opportunities

    - Average Number (Avg #) of Products on Open Deal Registrations

    - Avg Price

    - Avg Quantity

    - Avg Quarter Ago Total Revenue

    - Avg Revenue

    - Avg Total Quantity on Deal Registrations without Opportunities

    - Avg Total Quantity on Open Deal Registrations

    - Avg Total Revenue on Deal Registrations without Opportunities

    - Avg Total Revenue on Open Deal Registrations

    - Average Number (Avg #) of Products (Per Deal Registration)

    - Quarter Ago Total Revenue

    - Quarter Ago Total Revenue (000)

    - Total Quantity

    - Total Quantity (000)

    - Total Quantity on Deal Registrations without Opportunities

    - Total Quantity on Open Deal Registrations

    - Total Revenue

    - Total Revenue (000)

    - Total Revenue on Deal Registrations without Opportunities

    - Total Revenue on Deal Registrations without Opportunities (000)

    - Total Revenue on Open Deal Registrations

- Total Revenue on Open Deal Registrations (000)
- Principal Partner Account

Usage Notes

None

Dealer History Analytic Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Automotive Edition.

Business Purpose

The Dealer History Analytic subject area provides the ability to analyse dealer history with respect to service requests and activities.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Dealer
- Owned By User
- Date

Metrics

The complete list of metrics for this subject area is as follows:

- Dealer Metrics

    - Dealer Custom Metrics

    - Number (#) of Dealers

    - Number (#) of Service Requests (SRs)

    - Number (#) of Activities

    - Number (#) of Open Activities

    - Number (#) of Closed Activities

Usage Notes

None

Event History Analytic Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Life Sciences Edition.

Business Purpose

An event can be any type of promotional or educational event that is attended by sales personnel or other professionals. From a company's perspective, the following are the event types:

◼ **Sales Representative Level.** Executed by a manager or one or more sales representatives.

◼ **Corporate or National Level.** A national training event or meeting targeted at a specific group of professionals.

You can plan events at the national level for either a specific product or period and then allocate resources by region, district, or sales representative. For example, pharmaceutical companies require metrics and information about medical events to align sales and marketing activities. From a compliance perspective, reports provide information to companies, so that companies can control their budgets and ensure that there is little or no deviation.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Date
- Event
- Invitees
- Owned By User
- Product
- Product Category

Metrics

The complete list of metrics for this subject area is as follows:

- Event Metrics
    - Number (#) of Events
    - Number (#) of Invitees
    - Budget Surplus/Shortfall

      (Definition: The difference between the event budget and the event cost.)
    - Event Budget

      The Event Budget metric comes from the dimension. When only the Event dimension is used the metric is the sum of the dimension field value. However, when other dimensions (particularly invitee) are used, the metric is calculated as the maximum of the dimension field value.

■ Event Cost

(Definition: The cost of the completed activities for all attendees associated with an Event.)

Usage Notes

If your company changes the display name for Event to a custom name, the custom name appears in Oracle CRM On Demand Answers.

In previous releases reports that included the Product Category and Events dimensions produced no results if there is no product associated to the event. This behaviour has changed and now Product Category is independent of Event-Product associations. Reports now show results based on Product Category without the need for product being associated to an event.

Events with No Invitees
Events that have zero invitees are excluded from reports, except for one special case. The only way to have a zero invitee event appear in a report is to use the Event dimension only (do not add a second dimension) and do not include any metrics.

Household History Analytic Subject Area

Availability
This subject area is available only in the Oracle CRM On Demand Financial Services Edition.

Business Purpose
The Household History Analytics subject area provides the ability to generate reports on households for the Contact dimension. This subject area enables advisors and their managers to answer questions, such as the following:

■ Which clients belong to which households?

■ How are the household assets in my book of business divided up among my clients?

■ What are my top households by total asset value?

The Households History Analytics subject area also has a Portfolio dimension that can be used to report on information of associated portfolios of household contacts. Note that portfolio has only an indirect relationship with households (through contacts) and hence Portfolio dimension attributes cannot be used directly to analyse the household metrics. You can combine household reports with portfolio reports to provide an enhanced client service by understanding clients as members of a household.

Relationship Type
Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Contact
- Household
- Household Contact

Metrics

The complete list of metrics for this subject area is as follows:

- Household Metrics
  - Total Household Assets

- Total Household Assets

- Average (Avg) Total Household Assets

- Total Household Expenses

  - Total Household Expenses

  - Avg Total Household Expenses

- Total Household Income

  - Total Household Income

  - Avg Total Household Income

- Total Household Liabilities

  - Total Household Liabilities

  - Avg Total Household Liabilities

- Total Household Net Worth

  - Total Household Net Worth

  - Avg Total Household Net Worth

- Total Contact Assets

  - Total Assets

  - Avg Total Assets

- Total Contact Expenses

  - Total Expenses

  - Avg Total Expenses

- Total Contact Income

  - Total Income

  - Avg Total Income

- Total Contact Liabilities

  - Total Liabilities

  - Avg Total Liabilities

- Total Contact Net Worth

  - Total Net Worth

  - Avg Total Net Worth

- Household Custom Metrics

- Number (#) of Rolled Up Contacts

- Number (#) of Rolled Up Service Requests

- Number (#) of Rolled Up Leads

- Number (#) of Contacts
- Number (#) of Contact Service Requests
- Number (#) of Contact Leads
- Number (#) of Households

Usage Notes

The Contact dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Lead History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyse the lead metrics by account, account territory, campaign, contact, date, lead, opportunity, owned by user, and principal partner account. This subject area contains record types that refer to metrics that analyse the lead quality, lead conversion, and revenues associated with leads.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Campaign
- Lead

Dimensions

This subject area has the following dimensions:

- Account
- Account Territory
- Campaign
- Contact
- Date
- Lead
- Opportunity
- Owned By User
- Principal Partner Account (available only in Oracle CRM On Demand Partner Relationship Management Edition)

Metrics

The complete list of metrics for this subject area is as follows:

- Lead Metrics

  - Number (#) of Archived Leads

  - Number (#) of Leads

  - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)

  - Number (#) of Leads Resulting in Lost Opportunity

  - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)

  - Number (#) of New Opportunities

  - Number (#) of Qualified Leads

  - Number (#) of Rejected Leads

  - Number (#) of Wins

  - Average (Avg) Days to Convert Lead (Definition: The number of days between the lead-created date and lead-converted date divided by the number of leads that were converted to opportunities.)

  - Avg Days to Followup Lead (Definition: The number of days to follow up on the lead divided by the number of leads.)

  - Closed Revenue for Lead

  - Expected Revenue for Lead

  - Opportunity Revenue for Lead

  - Projected Revenue

Usage Notes

The Account and Contact dimensions include a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

MDF Request History Analytic Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Partner Relationship Management Edition.

Business Purpose

Market Development Funds (MDF) provide the brand owner with the ability to make marketing funds available to partners in a systematic way, so that partners sell the brand owner's products in specific geographical areas

or market the brand. Through MDF Requests, partners request preapprovals of funding for marketing activities. When the brand owner approves the MDF request, partners can execute the activity and then submit an MDF claim to redeem the preapproved money that was spent.

Brand owners require metrics and information about MDF requests for each partner and quarter so that they can align marketing and channel sales. The MDF Request Historical Analytics subject area gives brand owners the required information to control their MDF budgets and ensure that funds are allocated to activities that have the maximum return on investment.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type

field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Campaign

Dimensions

This subject area has the following dimensions:

- Principal Partner Account
- Campaign
- MDF Request
- Date
- Owned By User
- Approver

Metrics

The complete list of metrics for this subject area is as follows:

- MDF Request Metrics
    - MDF Request Custom Metrics
    - MDF Request Metrics by Submitted Date
        - Number (#) of MDF Requests
        - Amount Requested
        - Average Amount Requested
        - Amount Pre-Approved
        - Average Amount Pre-Approved
        - Total Claim Amount Requested
        - Average Total Claim Amount Requested
        - Total Claim Amount Approved
        - Average Total Claim Amount Approved
    - Number (#) of MDF Requests
    - Amount Requested
    - Average Amount Requested
    - Amount Pre-Approved

- Average Amount Pre-Approved
- Quarter Ago Amount Requested
- Average Quarter Ago Amount Requested
- Quarter Ago Amount Pre-Approved
- Average Quarter Ago Amount Pre-Approved
- Total Claim Amount Requested
- Average Total Claim Amount Requested
- Total Claim Amount Approved
- Average Total Claim Amount Approved
- Quarter Ago Total Claim Amount Requested
- Average Quarter Ago Total Claim Amount Requested
- Quarter Ago Total Claim Amount Approved
- Average Quarter Ago Total Claim Amount Approved
- Number (#) of MDF Request Pending Approval
- Amount Requested Pending Approval
- Number (#) of Submitted MDF Requests
- Number (#) of Approved MDF Requests
- Number (#) of Reject MDF Requests
- Number (#) of Returned MDF Requests
- Number (#) of Cancelled MDF Requests
- Number (#) of Expired MDF Requests
- Number (#) of Submitted MDF Claims
- Number (#) of Approved MDF Claims
- Number (#) of Rejected MDF Claims
- Percentage (%) of MDF Requests Approved
- Percentage (%) of MDF Requests Expired
- Percentage (%) of MDF Requests Rejected
- Percentage (%) of MDF Requests Returned
- Number (#) of Days Pending Approval
- Number (#) of Days to Approval
- Average Number (Avg #) of Days Pending Approval
- Avg Number (#) of Days To Approval

Usage Notes

If your company changes the display name for MDF Requests to a custom name, the custom name appears in Oracle CRM On Demand Answers.

Opportunity and Competitor History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyse the many-to-many relationship between opportunities and competitor accounts. This subject area is almost identical to the opportunity subject areas. The only difference is that it includes the competitor account dimension, which has a many-to-many relationship with the opportunity record type. This subject area allows you to create reports that show all the competitors for an opportunity. Because this subject area represents the many-to-many relationship between opportunities and competitor accounts, opportunities that do not have an association with at least one competitor account cannot be reported using this subject area. The attributes that define the competitor account relationship that are available for reporting include the following:

- Primary Contact

- Role

- Reverse Role

- Start Date

- End Date

- Strengths

- Weaknesses

- Comments

Relationship Type

Many-to-many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

■ Campaign

Dimensions

This subject area has the following dimensions:

■ Account

■ Account Territory

■ Campaign

■ Date

■ Opportunity

■ Opportunity Competitor

■ Owned By User

- Primary Contact
- Relationship Contact
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Opportunity Metrics
  - Opportunity Custom Metrics
  - Opportunity Metrics by Open Date
    - Number (#) of Open Opportunities
    - Number (#) of Opportunities
    - Number (#) of Contacts with Opportunities (Optys)
    - Closed Revenue
    - Expected Revenue
    - Revenue
    - Average Number (Avg #) of Days in Stage
    - Number (#) of Wins
    - Avg Deal Size (Definition: The average size of each sale for each customer, expressed as the number of units or the amount of revenue.)
    - Avg Sales Cycle
    - Opportunity Win Rate (Definition: The number of win opportunities divided by the number of won and lost opportunities.)
    - Opportunity Loss Rate
  - Revenue
  - Expected Revenue
  - Closed Revenue
  - Number (#) of Opportunities
  - Number (#) of Open Opportunities
  - Number (#) of Contacts with Opportunities (Optys)
  - Number (#) of Wins
  - Average Number (Avg #) of Days in Stage
  - Avg Deal Size (Definition: The average size of each sale for each customer, expressed as the number of units or amount of revenue.)
  - Avg Sales Cycle

- Opportunity Win Rate (Definition: The total number of win opportunities divided by the total number of won and lost opportunities.)

- Opportunity Loss Rate

- Quarter Ago Opportunity Revenue

- Quarter Ago Closed Revenue

Usage Notes

The Account and Primary Contact dimensions include a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Opportunity and Partner History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyse the many-to-many relationship between opportunities and partner accounts. This subject area is almost identical to the opportunity subject areas. The only difference is that it includes the partner account dimension, which has a many-to-many relationship with the opportunity record type. This subject area allows you to create reports that show all the partners for an opportunity. Because this subject area represents the many-to-many relationship between opportunities and partner accounts, opportunities that do not have an association with at least one partner account cannot be reported using this subject area. The attributes that define the partner account relationship that are available for reporting include the following:

- Primary Contact

- Role

- Reverse Role

- Start Date

- End Date

- Strengths

- Weaknesses

- Comments

Relationship Type

Many-to-many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

■ Campaign

Dimensions

This subject area has the following dimensions:

■ Account

■ Account Territory

- Campaign

- Date

- Opportunity

- Opportunity Partner

- Owned By User

- Primary Contact

- Relationship Contact

- Territory

Metrics

The list of metrics for this subject area is as follows:

- Opportunity Metrics

    - Opportunity Custom Metrics

    - Opportunity Metrics by Open Date

        - Number (#) of Open Opportunities

        - Number (#) of Opportunities

        - Number (#) of Contacts with Opportunities (Optys)

        - Closed Revenue

        - Expected Revenue

        - Revenue

        - Average Number (Avg #) of Days in Stage

        - Number (#) of Wins

        - Avg Deal Size (Definition: The average size of each sale for each customer, expressed as the number of units or revenue amount.)

        - Avg Sales Cycle

        - Opportunity Win Rate (Definition: The number of win opportunities divided by the total number of won and lost opportunities.)

        - Opportunity Loss Rate

    - Revenue

    - Expected Revenue

    - Closed Revenue

    - Number (#) of Opportunities

    - Number (#) of Open Opportunities

    - Number (#) of Contacts with Optys

- Number (#) of Wins

- Average Number (Avg #) of Days in Stage

- Avg Deal Size (Definition: The average size of each sale for each customer, expressed as the number of units or revenue amount.)

- Avg Sales Cycle

- Opportunity Win Rate (Definition: The number of win opportunities divided by the total number of won and lost opportunities.)

- Opportunity Loss Rate

- Quarter Ago Opportunity Revenue

- Quarter Ago Closed Revenue

Usage Notes

The Account and Primary Contact dimensions include a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Opportunity Contact History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

In this subject area, you can report on all contacts associated with an opportunity or a contact that is associated with multiple opportunities. In other opportunity subject areas, you can report only on an opportunity's primary contact. This subject area has no metrics.

Relationship Type

Many-to-Many

Dimensions

This subject area offers the following dimensions:

- Contact

- Opportunity

Metrics

None.

Usage Notes

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Contact
- Opportunity

Opportunity History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyse opportunities by account, territory, campaign, contact, territory, owner, and date dimensions. This subject area consists of two or more fact tables and includes opportunity and quota metrics. Opportunity metrics are defined at the lowest level of detail in this subject area. So, you can analyse the metrics for all dimensions. However, quota metrics are at a higher level of detail and can be analysed only by the following limited dimensions: Date (Month), Quota, and Owner.

Relationship Type

Multi-fact

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

■ Campaign

Dimensions

This subject area has the following dimensions:

■ Account

■ Account Territory

■ Campaign

■ Date

■ Opportunity

■ Owned By User

■ Primary Contact

- Principal Partner Account

- Quota

- Territory

Metrics

The list of metrics for this subject area is as follows:

- Opportunity Metrics

  - Opportunity Custom Metrics

  - Opportunity Metrics by Open Date

    - Number (#) of Open Opportunities

    - Number (#) of Opportunities

    - Number (#) of Contacts with Opportunities (Optys)

    - Closed Revenue

    - Expected Revenue

    - Revenue

    - Average Number (Avg #) of Days in Stage

    - Number (#) of Wins

    - Avg Deal Size (Definition: The average size of each sale for each customer, expressed as the number of units or revenue amount.)

    - Avg Sales Cycle

    - Opportunity Win Rate (Definition: The number of win opportunities divided by the number of won and lost opportunities.)

    - Opportunity Loss Rate

  - Revenue

  - Expected Revenue

  - Closed Revenue

  - Number (#) of Opportunities

  - Number (#) of Open Opportunities

  - Number (#) of Contacts with Optys

  - Number (#) of Wins

  - Average Number (Avg #) of Days in Stage

  - Avg Deal Size (Definition: The average size of each sale for each customer, expressed as the number of units or revenue amount.)

  - Avg Sales Cycle

- Opportunity Win Rate (Definition: The number of win opportunities divided by the number of won and lost opportunities.)

- Opportunity Loss Rate

- Quarter Ago Opportunity Revenue

- Quarter Ago Closed Revenue

- Quota Metrics

    - Quota Value

Usage Notes

The Account and Primary Contact dimensions include a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

The Opportunities Reporting subject area and the Opportunity Historical Analytic subject area provide different metrics. Before selecting one of these subject areas, review the provided metrics in both to make sure you use the subject area that best suits your needs,

Opportunity Product Revenue History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyse opportunity product revenues by account, account territory, partner, campaign, opportunity, opportunity product, owned by user, product, and product category. Because each recurring product-revenue record might have a different start date, this subject area is at the most granular level of detail and contains one row for each recurring product-revenue record within the opportunity. Given the high level of detail of this subject area, it provides the greatest flexibility to roll up data at any level of the supported dimensions. This subject area also contains the quota dimension and metrics, which allow you to report on both opportunity product revenue and quota metrics in the same report.

Relationship Type

Multi-fact

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the

optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

■ Campaign

Dimensions

This subject area has the following dimensions:

■ Account

■ Account Territory

■ Campaign

■ Date

■ Opportunity

- Opportunity Product Revenue
- Owned By User
- Primary Contact
- Principal Partner Account (available only in Oracle CRM On Demand Partner Relationship Management Edition)
- Product
- Product Category
- Quota
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Opportunity Product Revenues Metrics
    - Number (#) of Products
    - Average Number (Avg #) of Products
- Quota Metrics
    - Quota Value

Usage Notes

The Account and Primary Contact dimensions include a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Opportunity Team History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the relationship between opportunities and opportunity teams. Use this subject area to query for team members involved in an opportunity. This subject area has no metrics.

Relationship Type

Many-to-Many.

Dimensions

This subject area offers the following dimensions:

- Account
- Opportunity
- Opportunity Team
- Owned By User

Metrics

None.

Usage Notes

Data Visibility. If the Historical Subject Area settings you defined in your profile is Manager Visibility or Team Visibility, this subject area uses the Team Visibility mode and you can report on all the opportunities for which you are either the owner or a team member. If the setting defined in your profile is Full Visibility, opportunities either owned by you or your subordinates or the records in which you or your subordinates are added as team members can be reported upon.

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Partner History Analytic Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Partner Relationship Management Edition.

Business Purpose

The Partner History Analytic subject area provides the ability to analyse partner history. You can analyse leads, opportunities, and revenue by partner and territory.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Partner
- Territory
- Owned By User
- Date

Metrics

The complete list of metrics for this subject area is as follows:

- Owner Partner Metrics
  - Number (#) of Opportunities
    - Number (#) of Partners with Opportunities

- Number (#) of Wins

- Average (Avg) Closed Revenue

- Avg Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)

- Closed Revenue

- Closed Revenue (000)

- Product Closed Revenue

- Product Closed Revenue (000)

- Product Revenue (000)

- Number (#) of Leads

- Number (#) of Archived Leads

- Number (#) of Qualified Leads

- Number (#) of Rejected Leads

- Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)

- Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)

- Number (#) of Leads Resulting in Lost Opportunity

- Avg Days to Convert Lead (Definition: The number of days between the lead-created date and lead-converted date divided by the number of leads converted to opportunities.)

- Avg Days to Follow-up Lead

- Avg Potential Revenue

- Potential Revenue

- Potential Revenue (000)

- Number (#) of Partners with Leads

- Partner Custom Metrics

- Number (#) of Partners

Usage Notes

None

Pipeline History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

The pipeline history subject area provides a monthly snapshot of all opportunities in Oracle CRM On Demand. Pipeline snapshots are taken daily during the nightly process, but the archiving process keeps only the latest pipeline snapshot for each month and purges the other snapshots. These pipeline snapshots are never deleted. During the full extract, transform and load (ETL) of data, these snapshots are backed up and fully restored. If companies change their fiscal calendar type, these historical snapshots will not be realigned with their new fiscal calendar definition. For companies with a custom fiscal calendar type, these historical snapshots can be reported only for the fiscal year definitions that are defined in Oracle CRM On Demand. Snapshots are taken of opportunities without a close date or of opportunities in which the close date is in the current quarter or in a future quarter.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only

Record Type	Oracle CRM On Demand Answers Coverage
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Account
- Date
- Opportunity
- Owned By User
- Pipeline Snapshot Date
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Historical Pipeline Metrics

  - Revenue. This metric indicates the revenue from the opportunity.

  - Expected Revenue. This metric indicates the opportunity revenue multiplied by the probability of the opportunity.

  - Closed Revenue. This metric indicates the revenue of the closed/won opportunity. When the opportunity's status is Closed/Won, then the revenue and closed revenue have the same value.

  - Revenue (000). This metric indicates the revenue from the opportunity, in thousands.

  - Expected Revenue (000). This metric indicates the opportunity revenue multiplied by the probability of the opportunity, in thousands.

  - Closed Revenue (000). This metric indicates the revenue of the closed/won opportunity, in thousands. When the opportunity's status is Closed/Won, then the revenue and closed revenue have the same value.

  - Quarter Ago Opportunity Revenue. This metric indicates the value of the revenue from one quarter ago.

  - Quarter Ago Expected Revenue. This metric indicates the value of the expected revenue from one quarter ago.

- Quarter Ago Closed Revenue. This metric indicates the value of the closed revenue from one quarter ago.

- Quarter Ago Opportunity Revenue (000). This metric indicates the value of the revenue from one quarter ago, in thousands.

- Quarter Ago Expected Revenue (000). This metric indicates the value of the expected revenue from one quarter ago, in thousands.

- Quarter Ago Closed Revenue (000). This metric indicates the value of the closed revenue from one quarter ago, in thousands.

- Territory

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Portfolio History Analytic Subject Area

Availability

This subject area is available only in the Oracle CRM On Demand Financial Services Edition.

Business Purpose

This subject area provides the ability to analyse portfolio history, contacts, and products. Portfolio reports provide the capability to generate reports about portfolios for the following dimensions: Contact, Account, Product, Advisor, and Time. This report enables advisors and their managers to answer questions, such as the following:

- What financial products do clients own and what is their demographic profile?

- How much of my clients' assets are invested in which securities and asset classes?

- What is the size of assets in each advisor's book of business?

- What are the asset classes in each advisor's book of business?

- Who are my best clients by portfolio size and revenue?

This information allows you to analyse portfolios with respect to both clients and advisors.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Contact
- Date
- Institution
- Owned By User
- Portfolio
- Product

Metrics

The complete list of metrics for this subject area is as follows:

- Portfolio Metrics
  - Portfolio Custom Metrics
  - Number (#) of Portfolios
  - Total Asset Value
  - Loan Amount
  - Premium
  - Revenue
  - Face Value
  - Credit Limit
  - Average (Avg) Total Asset Value
  - Avg Loan Amount
  - Avg Premium
  - Avg Revenue
  - Avg Face Value
  - Avg Credit Limit

Usage Notes

The Contact dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

The Portfolio dimension normally includes non-financial assets such as vehicles unless your administrator has specifically excluded such non-financial assets in Portfolio lists using the Exclude Vehicle / Asset Records from Portfolio Accounts option in the Company Profile page.

Product History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area enables you to analyse revenue metrics by product, account, user, opportunity, date, and territory dimensions. The level of detail of this subject area is slightly higher than the Opportunity-Product Reporting subject area, because it allows you to analyse opportunity revenues from the focus of the product

dimension. This subject area bridges the analysis gap between the Opportunities Reporting subject area and Opportunity-Product Reporting subject area.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

■ Account

■ Date

- Opportunity
- Owned By User
- Products
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Product Revenue Metrics
    - Product Revenue Custom Metrics
    - Revenue
    - Product Expected Revenue
    - Product Closed Revenue
    - Product Revenue (000)
    - Product Expected Revenue (000)
    - Product Closed Revenue (000)
    - Purchase Price
    - Avg Purchase Price
    - Avg Quantity
    - Total Quantity
    - Quarter Ago Product Revenue
    - Quarter Ago Product Closed Revenue
    - Quarter Ago Product Revenue (000)
    - Quarter Ago Product Closed Revenue (000)

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

The Forecast Flag field in the Product dimension in this subject area is mapped to the Opportunity Revenue record type and if this field is selected with other Product fields (such as Product Name), only the product records that are associated to an Opportunity Product Revenue record appear in the report.

Quote History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand. The Quotes object must be provisioned by an administrator.

Business Purpose

Use this subject area to analyse quotes by account, date, opportunity, and owner dimensions.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Date
- Opportunity
- Owned By User
- Quote

Metrics

The complete list of metrics for this subject area is as follows:

- Quote Custom Metrics
- Number (#) of Quotes

Usage Notes

None.

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Optimised Filtering Field

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account
- Opportunity
- Owned by User
- Quote

Sales Stage History Analytic Subject Area

The Sales Stage History has the following subject areas.

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows analysing opportunities at different sales stages by account, opportunity, sales stage, and date dimensions. The sales stage history subject area represents event-based historical snapshots of opportunities and only available on the historical side. Because opportunities go through multiple sales stages, this subject area is denser than the opportunities subject area with as many records as number of opportunities times sales stages they went through.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Service Request	All optimised fields

Dimensions

This subject area offers the following dimensions:

- Account

- Historical Sales Stage

- Opportunity

Metrics

The following is the complete list of metrics for this subject area:

- Sales Stage Metrics

    - Avg Days in Stage

    - Number of (#) of Days in Stage

    - Number of (#) of Opportunities

    - Fallout

    - Fallout Ratio

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Service Request History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyse service request history, accounts, and assets. This subject area provides the ability to analyze service requests by account, contact, service request, user, partner, opportunity, and date dimensions. It helps you to measure and analyse important performance metrics of the customer service request organisation, including how long service requests have been open and the average duration to close them. Using these service request performance metrics can help your company to improve customer satisfaction, employee productivity, and reduce operational costs.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

■ Asset

Dimensions

This subject area has the following dimensions:

- Account

- Asset

- Contact

- Date

- Dealer

- Opportunity

- Owned By User

- Principal Partner Account (available only in Oracle CRM On Demand Partner Relationship Management Edition)

- Product

- Service Request

- Vehicle

Metrics

The complete list of metrics for this subject area is as follows:

- Service Request Metrics

  - Service Request Metrics by Close Date

  - Number (#) of Cancelled SRs (Close Date)

    - Number (#) of Closed Service Requests (SRs) (Close Date)

    - Average (Avg) Days to Close SRs (Close Date)

    - Avg Minutes to Close SRs (Close Date)

  - Service Request Custom Metrics

  - Number (#) of SRs

  - Number (#) of Open SRs

  - Number (#) of Closed SRs

  - Number (#) of Pending SRs

  - Number (#) of Cancelled SRs

  - Avg Open SR Age

  - Avg Days to Close SR

  - Avg Open SR Age (Minutes)

  - Avg Minutes to Close SRs

Usage Notes

The custom fields in the Vehicle dimension are shared between the Vehicle record type and the Asset record type. The Vehicle record type has two sets of custom fields: one set that is shared with the Asset record type and appears in the Vehicle dimension, and one set that is exclusive to the Vehicle record type only. The custom fields that are exclusive to the Vehicle record type are not available in any reports. When adding custom fields to the Vehicle record type make sure that any fields that you want to appear in reports are added to the shared Asset-Vehicle custom fields and not to the Vehicle-only custom fields.

The Account, Contact, and Service Request dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Use the Opportunity dimension to analyse metrics and attributes in the opportunity to service request relationship.

Shared Address History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area enables you to report on shared addresses and their associations with accounts, contacts, and their related metrics. Using this subject area, you can report on the accounts and contacts that are attached to or share the same address.

Relationship Type

Many-to-many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Account
- Contact
- Shared Address

Metrics

The complete list of metrics for this subject area is as follows:

- Shared Address Picklist Fields
    - Indexed Picklist 1
    - Indexed Picklist 2
    - Indexed Picklist 3
    - Indexed Picklist 4
    - Indexed Picklist 5
    - Validated Status
- Shipping Address (Extended)
    - Address 1
    - Address 2
    - Address 3

- City
- Country
- PO Box/Sorting Code
- Province
- State
- Zip/Post Code
- Number (#) of Accounts
- Number (#) of Accounts and Contacts
- Number (#) of Contacts

Usage Notes

None

Solutions History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

In this subject area, you can analyse solutions by product, product category, service request, and expiration date dimensions, as well as the relationship between solutions and their associated service requests. You can also analyse important solution and related service requests metrics that help your company to evaluate the status and effectiveness of solutions.

Relationship Type

Many-to-Many

Dimensions

This subject area has the following dimensions:

- Expiration Date
- Product
- Product Category
- Service Request

■ Solution

Metrics

The complete list of metrics for this subject area is as follows:

■ Solution Custom Metrics

   ■ Average (Avg) Indexed Currency 0

   ■ Average (Avg) Indexed Number 0

   ■ Indexed Currency 0

   ■ Indexed Number 0

■ Number (#) of Solutions

■ Number (#) of Approved Solutions

■ Number (#) of Published Solutions

■ Number (#) of Obsolete Solutions

■ Number (#) of SRs

■ Number (#) of Open SRs

■ Number (#) of Closed SRs

Usage Notes

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics.* Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Optimised Filter Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Product
- Service Request
- Solution

Usage Notes

The Service Request dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Special Pricing Product History Analytic Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Partner Relationship Management Edition.

Business Purpose

Special pricing requests allow partners and brand owners to execute a set of business processes, by which a partner asks the brand owner for a lower price on a product (for various reasons, such as a response to a competitive deal or general downward price trends).

This subject area provides you with the ability to perform historical analysis and report on special pricing requests and special pricing products, so you can assess partner performance. You can use metrics and information, such as authorised price reductions for each product, partner, and quarter to measure discount effectiveness and product performance in the channel.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Date (based on the Special Pricing Request Start Date)

- Deal Registration

- End Customer

- Last Approved By

- Opportunity

- Owned By User

- Principal Partner Account

- Product

- Product Category

- Special Pricing Request

Metrics

The complete list of metrics for this subject area is as follows:

- Special Pricing Product Metrics

  - Special Pricing Product Metrics by Authorised Date

    - Number (#) of Special Pricing Requests (Authorised Date)

    - Amount Authorised (Authorised Date)

    - Amount Authorised (Authorised Date) (000)

    - Amount Requested (Authorised Date)

    - Amount Requested (Authorised Date) (000)

    - Avg Amount Authorised (Authorised Date)

    - Avg Amount Requested (Authorised Date)

    - Avg Quantity (Authorised Date)

    - Quantity (Authorised Date)

  - Special Pricing Product Metrics by Submitted Date

    - Number (#) of Special Pricing Requests (Submitted Date)

    - Amount Authorised (Submitted Date)

    - Amount Authorised (Submitted Date) (000)

    - Amount Requested (Submitted Date)

    - Amount Requested (Submitted Date) (000)

    - Avg Amount Authorised (Submitted Date)

- Avg Amount Requested (Submitted Date)

- Avg Quantity (Submitted Date)

- Quantity (Submitted Date)

- Number (#) of Special Pricing Requests

- Amount Authorised

- Amount Authorised (000)

- Amount Requested

- Amount Requested (000)

- Avg Amount Authorised

- Avg Amount Requested

- Avg Authorised Cost

- Avg Authorised Discount Percent

- Avg MSRP (Manufacturer's Suggested Retail Price)

- Avg Purchase Cost

- Avg Quantity

- Avg Requested Cost

- Avg Requested Discount Percent

- Avg Requested Resale Price

- Avg Suggested Resale Price

- Quantity

- Quarter Ago Amount Authorised

- Quarter Ago Amount Authorised (000)

- Quarter Ago Amount Requested

- Quarter Ago Amount Requested (000)

- Quarter Ago Quantity

Usage Notes

None

Usage Tracking Analysis Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand. Access to this subject area requires the Usage Tracking privilege. The administrator user role is granted this privilege by default.

Business Purpose

This subject area enables users with the Usage Tracking privilege to analyse the usage of Oracle CRM On Demand within their company. Companies can analyse the usage of the following application areas in Oracle CRM On Demand:

- Application usage
- User adoption
- Set-up and configuration

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Content
- Date
- Object Type
- User
- User Sign In History

Metrics

The complete list of metrics for this subject area and the fields for which they are stored is as follows:

The following table shows the Analytics Performance metrics. These metrics represent the performance of queries.

Metric	User	Date (Week)	Object Type	Description
Number (#) of Requests	Yes	Yes	Yes	Number of requests by report name and dashboard name by week. If a report is also available on a dashboard, then the number of requests for the report reflects

				only the requests where it was run as a report in Oracle CRM On Demand Answers. Because a dashboard often contains more than one report, requests run within a dashboard are not included in the count that calculates for reports.
Number (#) of Times Failed	Yes	Yes	Yes	Number of times requests failed by report and dashboard names by week.
Average (Avg) Response Time (s)	Yes	Yes	Yes	Average response time (in seconds) for requests.

The following table shows the Application Usage metrics in Oracle CRM On Demand. These metrics represent the usage of various application object types, including how many records were created, updated, and deleted. In the table, *Yes* indicates that the metric is available for the field.

Metric	User	Date (Week)	Object Type	Description
Number (#) of Records Created	Yes	Yes	Yes	Number of records created by object by user by month
Number (#) of Records Updated	Yes	Yes	Yes	Number of records updated by object by user by month
Number (#) of Records Deleted	Yes	Yes	Yes	Number of records deleted by object by user by month

The following table shows the Page View Performance metrics in Oracle CRM On Demand.

Metric	User	Date (Week)	Object Type	Description
Number (#) of Requests	Yes	Yes	Yes	Number of requests by page by week
Average (Avg) Response Time (ms)	Yes	Yes	Yes	Average response time (in milliseconds) for page views
Max Response Time (ms)	Yes	Yes	Yes	Maximum response time (in milliseconds) for page views
Min Response Time (ms)	Yes	Yes	Yes	Minimum response time (in milliseconds) for page views

NOTE: The Max Response Time and Min Response Time values are available only for the page view records that have been loaded since this feature became available. Page view records loaded in Oracle CRM On Demand Release 25 and earlier have NULL values because this data was not recorded in those releases.

The following table shows the Set-up and Configuration metrics. These metrics are a snapshot of the latest set-up and configuration of Oracle CRM On Demand as it existed at the time of an incremental refresh of your usage tracking data. The set-up and configuration metrics are unique because they are not captured at any dimension level.

Metric	Description
Number (#) of Administrators	Number of administrators granted with any of the following privileges: Manage Company, Manage Company - Define Currencies, Manage Company - Reset All Passwords, Manage Themes, Manage Content, Manage Content - Manage Attachments and Detail Page Images, Manage Books, Manage Territories, Manage Users, Manage Roles and Access, Manage Users and Access - Manage Delegated Users
Number (#) of Assignment Rules	Number of assignment rules defined in Oracle CRM On Demand
Number (#) of Books	Number of books defined in Oracle CRM On Demand
Number (#) of Currencies	Number of currencies activated in Oracle CRM On Demand
Number (#) of Custom Fields	Number of custom fields used in Oracle CRM On Demand
Number (#) of Custom Objects	Number of custom objects deployed in Oracle CRM On Demand
Number (#) of Custom Tabs	Number of custom Web tabs used in Oracle CRM On Demand
Number (#) of Groups	Number of groups set up in Oracle CRM On Demand
Number (#) of Languages	Number of languages enabled in Oracle CRM On Demand
Number (#) of Products	Number of products defined in Oracle CRM On Demand
Number (#) of Sales Process	Number of sales processes defined in Oracle CRM On Demand
Number (#) of Territories	Number of territories set up in Oracle CRM On Demand
Number (#) of Web Applets	Number of Web applets used in Oracle CRM On Demand
Number (#) of Web Links	Number of Web links used in Oracle CRM On Demand
Number (#) of Workflows	Number of workflows set up in Oracle CRM On Demand

The following table shows the User Adoption metrics. These metrics allow companies to monitor and analyse the user adoption of the Oracle CRM On Demand application. In the table, *Yes* indicates that the metric is available for the field.

Metric	User	Date (Month)	Description
Number (#) of Active Users	No	Yes	Number of active users existing in the application
Number (#) of Days Since Last Login	Yes	No	Number of days since the last login by the user

Number (#) of Delegated Users	No	Yes	Number of delegated users existing in that month
Number (#) of Licences	No	No	Number of licences defined in the company profile
Number (#) of Total Logins	Yes	Yes	Number of times a user logged in during a given month. If a user logs in three times a day, it is counted as 3 logins and added to the current month's value.
Number (#) of Unique Logins	Yes	Yes	Number of unique times a user logged in during a given month. If a user logs in three times a day, it is counted as 1 unique login and added to the current month's value.
Number (#) of Unsuccessful Logins	Yes	Yes	Number of unsuccessful logins by user by month
Percentage (%) Logged In	No	Yes	Number of users logged in that month divided by the number of active users.
Average (Avg) Login Monthly Frequency	No	Yes	Number of unique logins for a given month divided by the number of users logged in for that month.

Usage Notes

This topic provides usage notes.

About Usage Tracking Data

The usage tracking data in the data warehouse refreshes weekly from information in your Oracle CRM On Demand application data. Refreshing the usage tracking data happens on weekends and does not follow the nightly, incremental refresh of the rest of the data in Oracle CRM On Demand Answers.

Usage tracking metrics are recomputed only for the current month, and the prior month's data is not recomputed unless the week spans the end of the month. For example, when the incremental refresh for

usage tracking runs on Friday, 28 May 2010, the usage tracking metrics are recomputed for the entire month of May starting from May 1, 2010. When the incremental refresh for usage tracking runs on Friday, 4 June 2010, the usage tracking metrics are recomputed for the months of both May and June, because that week spanned the months of May and June.

Usage tracking metrics are summarised by calendar months. Even though it is possible to analyse these metrics by a company's fiscal calendars, they are not aligned with the fiscal calendar for companies with nonstandard calendars. There might be some oddity in a fiscal calendar definition especially if you are using a 4-4-5 or 5-4-4 or a custom calendar where two calendar months start in one fiscal period or no calendar month starts in a fiscal period. In situations like this, the usage tracking metrics might be inflated or missing for a given fiscal period.

Most usage tracking data is captured at the week level. Some user adoption metrics are not captured at the week level. All set-up and configuration metrics are not captured at the week level. Because the usage tracking data is captured at the week level, it can be aggregated by month, quarter, and year. However, it might not produce any results if it is run at levels lower than the week level.

About User-Login History

The user-login history data that is older than 90 days is continuously purged from the Oracle CRM On Demand application. Hence, the Usage Tracking feature can support approximately 90 days of user adoption metrics when the Oracle CRM On Demand application is first upgraded to this release. However, the user adoption history data is retained in the data warehouse to support the historical trend analysis of user adoption metrics in the Oracle CRM On Demand Analytics. This data is retained until the next full refresh even after the data is purged from Oracle CRM On Demand.

Usage Tracking Metrics

Usage tracking metrics are collected by calendar week. If you are using a nonstandard calendar, such as 5-4-4, 4-4-5, or a custom fiscal calendar, then it is possible that one fiscal month or quarter might have more or fewer weeks compared to other fiscal months or quarters. So, your metrics might appear slightly inflated or deflated for a given month or quarter. This behaviour is expected where your company's metrics are not fully aligned with its fiscal calendar definitions when they are analysed by fiscal calendar months and quarters.

Content Dimension

The Content dimension is common to both the Analytics Performance metrics and Page View Performance metrics.

To report on Analytics Performance metrics, use the Content Category field to filter for the following condition:

```
Content Category = Analytics
```

To report on Page View Performance metrics, use the Content Category field to filter for the following condition:

```
Content Category = Page View
```

When analysing Page View Performance metrics, the only Content dimension fields available are: Content Category and Content Name. For Page Views Performance, the Content Name value represents the title of the screen. For Analytics Performance, the Content Name value represents the report or dashboard name.

To display the path of the reports in your analysis, use the Content Details field within the Content dimension. Content Details appear only when the Content Category is set to Analytics and for content with a Content Type of Shared Report/Personal Report. The format for the report paths is as follows:

■ Path for personal folder of a user:

/users/<User Login>

Example:

/users/analyticsrto10#admin

■ Path for company shared folder:

/shared/Company_<number>_Shared_Folder

Example:

/shared/Company_9999_Shared_Folder

■ An embedded report path has the following suffix:
/_Emb

Analytics Performance Metrics

You cannot combine Analytics Performance metrics with any other metrics. You cannot combine the Page View Performance metrics with any other metrics. These two performance-related metrics are stored using different levels of detail, which are different from each other and from all the other metrics. The Analytics Performance metrics are captured at the content, user, and week level. These metrics are collected as each report is executed every time by each user, and they are summarised at the week level. The average response time is measured in seconds.

In contrast, the Page View Performance metrics are captured at the page and week level. These metrics are collected as each page is viewed each time, and they are summarised at the week level. The average response time is measured in milliseconds.

Analytics performance metrics can report metrics by individual users. However, page view performance is only at the company level. Most page views have a title, but for page views with missing titles the usage performance metric is reported as *Others*. Analytics performance metrics are included for shared and personal dashboards, but they are not included for dynamic queries. Both page view and analytics content names display metrics that are based on the company default language and standard object naming. They do not support user language or object renaming.

User Sign In History Restrictions

The User Sign In History dimension specifies the source of the user sign in, such as Interactive, Web Services, Mobile, and so on. This dimension has the following restrictions:

■ The only metrics that can be used with User Sign In History are the following User Adoption metrics:

 ■ Number of (#) Total Logins

 ■ Number of (#) Unsuccessful Logins

■ Only the current month of data is updated by an incremental refresh.

■ History data for the Sign In Type columns is not updated through an incremental refresh.

NOTE: The Sign In Type values are available only for the User Sign In records that have been loaded since this feature became available. User Sign In History records loaded in Oracle CRM On Demand Release 29 and earlier have NULL values because this data was not recorded in those releases.

Account Contacts Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and contacts. You can use it to report on all contacts associated with an account or a contact that is shared by multiple accounts. You cannot use this subject area to report on accounts that are not associated with any contact, or to report on contacts that are not linked to an account. This subject area has no metrics.

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

■ Account

■ Contact

Metrics

None

Usage Notes

The Account and Contact dimensions include a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. The first five optimised fields of each field type of selected record types are available in Oracle CRM On Demand Answers. Optimised custom fields are in folders where the name ends with Optimised Custom Fields

or Optimised Custom Metrics, such as Account Optimised Custom Fields and Opportunity Optimised Custom Metrics. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area. The following record types have optimised custom fields and metrics, and one or more of these record types might be present as dimensions or facts in this subject area:

- Account
- Contact

Account Revenues Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

The Account Revenue Analytics subject area provides the ability to track account revenues by product, category, territory, and user.

Relationship Type

Multi-Fact

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Account
- Account Revenue
- Account Territory
- Campaign
- Owned By User
- Product
- Product Category
- Quota

Optimised Filtering Fields

This subject area has fields that are optimised to reduce the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For more information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account
- Campaign

Metrics

The complete list of metrics for this subject area is as follows:

- Account Revenue Metrics:

    - Account Revenue Custom Metrics

    - Number (#) of Products

    - Average Number (Avg #) of Products

- Quota Metrics:

    - Quota Value

Usage Notes

For more information about account revenue capabilities, see Forecasts Reporting subject area (on page 1113). In the Forecast subject area, you can combine forecast, quota, and account revenues into a single, queried report. Quota folder dimensions and metrics can be combined only with Owned by User folder dimensions and metrics.

The Account dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Accounts Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides a summary view of the operating metrics for a company's accounts. The account record type is the record type that you want to analyse. You can use this subject area to answer basis questions about account performance: Which companies have the highest number of service requests? Which companies have the largest number of opportunities? This subject area allows you to group and roll up these metrics at any level by account, account territory, and date dimensions. For a deeper analysis involving other business areas, you must use other subject areas.

Relationship Type

Summary

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the

optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Account
- Campaign
- Date Created
- Owned By User
- Territory

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimised version of the Last Call Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field.

For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

■ Account

■ Campaign

Metrics

The complete list of metrics for this subject area is as follows:

■ Account Metrics

   ■ Account Custom Metrics

   ■ Revenue

   ■ Revenue (000)

   ■ Average (Avg) Revenue

   ■ Closed Revenue

   ■ Closed Revenue (000)

   ■ Average (Avg) Closed Revenue

   ■ Average (Avg) Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)

   ■ Potential Revenue

   ■ Average (Avg) Potential Revenue

   ■ Revenue

   ■ Product Revenue (000)

   ■ Product Closed Revenue

   ■ Product Closed Revenue (000)

   ■ Number (#) of Accounts

   ■ Number (#) of Accounts with Opportunities

   ■ Number (#) of Activities

   ■ Number (#) of Contacts

   ■ Number (#) of Opportunities

   ■ Number (#) of Wins

   ■ Number (#) of Service Request (SRs)

   ■ Number (#) of Cancelled SRs

   ■ Number (#) of Closed SRs

   ■ Number (#) of Open SRs

   ■ Number (#) of Pending SRs

- Average (Avg) Open SR Age

- Average (Avg) Days to Close SR

- Number (#) of Leads

- Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)

- Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)

- Number (#) of Leads Resulting in Lost Opportunity

- Number (#) of Qualified Leads

- Number (#) of Rejected Leads

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Accounts and Competitors Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to report on the many-to-many relationship between accounts and competitor accounts. This subject area is almost identical to the account subject areas. The only difference is that it includes the competitor dimension, which has a many-to-many relationship with the account record type. It allows you to create reports that show all the competitors for an account. Because this subject area represents the many-to-many relationship between accounts and competitor accounts, accounts that do not have an association with at least one competitor account cannot be reported using this subject area. The attributes that define the competitor account relationship that are available for reporting include the following:

- Primary Contact

- Role

- Reverse Role

- Start Date

- End Date

- Strengths

- Weaknesses

- Comments

Relationship Type

Many-to-many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics.* Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Account
- Account Competitor
- Campaign
- Date Created
- Owned By User

■ Relationship Contact

■ Territory

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimised version of the Last Call field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For more information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

■ Account

■ Campaign

Metrics

The complete list of metrics for this subject area is as follows:

■ Account Metrics

    ■ Account Custom Metrics

    ■ Revenue

    ■ Revenue (000)

    ■ Average (Avg) Revenue

    ■ Closed Revenue

    ■ Closed Revenue (000)

    ■ Average (Avg) Closed Revenue

    ■ Average (Avg) Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)

    ■ Potential Revenue

    ■ Average (Avg) Potential Revenue

    ■ Revenue

    ■ Product Revenue (000)

    ■ Product Closed Revenue

    ■ Product Closed Revenue (000)

    ■ Number (#) of Accounts

    ■ Number (#) of Accounts with Opportunities

    ■ Number (#) of Activities

- Number (#) of Contacts

- Number (#) of Opportunities

- Number (#) of Wins

- Number (#) of Service Requests (SRs)

- Number (#) of Cancelled SRs

- Number (#) of Closed SRs

- Number (#) of Open SRs

- Number (#) of Pending SRs

- Average (Avg) Open SR Age

- Average (Avg) Days to Close SR

- Number (#) of Leads

- Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)

- Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)

- Number (#) of Leads Resulting in Lost Opportunity

- Number (#) of Qualified Leads

- Number (#) of Rejected Leads

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Accounts and Partners Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and partner accounts. This subject area is almost identical to the account subject areas. The only difference is that it includes the partner dimension, which has a many-to-many relationship with the account record type. This subject area allows you to create reports that show all the partners for an account. Because this subject area represents the many-to-many relationship between accounts and partner accounts, the accounts that do not have an association with at least one partner account cannot be reported using this subject area. The attributes that define the partner account relationship that are available for reporting include the following:

- Primary Contact

- Role

- Reverse Role

- Start Date

- End Date

- Strengths

- Weaknesses

- Comments

Relationship Type

Many-to-many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area offers the following dimensions:

- Account
- Account Partner
- Campaign
- Date Created
- Owned By User
- Relationship Contact
- Territory

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimised version of the Last Call Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account
- Campaign

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
  - Account Custom Metrics
  - Revenue
  - Revenue (000)
  - Average (Avg) Revenue
  - Closed Revenue
  - Closed Revenue (000)
  - Average (Avg) Closed Revenue

- Average (Avg) Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)

- Potential Revenue

- Average (Avg) Potential Revenue

- Revenue

- Product Revenue (000)

- Product Closed Revenue

- Product Closed Revenue (000)

- Number (#) of Accounts

- Number (#) of Accounts with Opportunities

- Number (#) of Activities

- Number (#) of Contacts

- Number (#) of Opportunities

- Number (#) of Wins

- Number (#) of Service Requests (SRs)

- Number (#) of Cancelled SRs

- Number (#) of Closed SRs

- Number (#) of Open SRs

- Number (#) of Pending SRs

- Average (Avg) Open SR Age

- Average (Avg) Days to Close SR

- Number (#) of Leads

- Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)

- Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)

- Number (#) of Leads Resulting in Lost Opportunity

- Number (#) of Qualified Leads

- Number (#) of Rejected Leads

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Accounts and Related Accounts Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and related accounts. This subject area is almost identical to the account subject areas. The only difference is that it includes the related account dimension, which has a many-to-many relationship with the account record type. This subject area allows you to create reports that show all the related accounts for an account. Because this subject area represents the many-to-many relationship between accounts and related accounts, accounts that do not have an association with at least one related account cannot be reported using this subject area. The attributes that define the related account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Account
- Campaign
- Date Created
- Owned By User
- Related Account
- Relationship Contact
- Territory

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimised version of the Last Call Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account
- Campaign

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
    - Account Custom Metrics
    - Revenue
    - Revenue (000)
    - Average (Avg) Revenue
    - Closed Revenue
    - Closed Revenue (000)
    - Average (Avg) Closed Revenue
    - Average (Avg) Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)
    - Potential Revenue
    - Average (Avg) Potential Revenue
    - Revenue
    - Product Revenue (000)
    - Product Closed Revenue
    - Product Closed Revenue (000)
    - Number (#) of Accounts
    - Number (#) of Accounts with Opportunities
    - Number (#) of Activities
    - Number (#) of Contacts
    - Number (#) of Opportunities
    - Number (#) of Wins
    - Number (#) of Service Requests (SRs)
    - Number (#) of Cancelled SRs
    - Number (#) of Closed SRs
    - Number (#) of Open SRs
    - Number (#) of Pending SRs
    - Average (Avg) Open SR Age
    - Average (Avg) Days to Close SR
    - Number (#) of Leads
    - Number (#) of Leads Converted to Opportunities

■ Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)

■ Number (#) of Leads Resulting in Lost Opportunity

■ Number (#) of Qualified Leads

■ Number (#) of Rejected Leads

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Activities Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyse a set of activity metrics by activity, account, opportunity, lead, campaign, contact, service request, and date dimensions. Because this subject area represents every activity event and interaction in connection with these record types, this subject area is at the lowest level of detail, which means the activity fact table that determines this subject area might be the largest. This subject area allows you to roll up and analyse activity metrics, using the largest set of dimensions. This subject area is a multi-fact subject, which allows the reporting of user quotas in relation to activity metrics.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Campaign
- Contact
- Lead
- Opportunity
- Service Request
- Quota

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account

- Activity

- Campaign

- Contact

- Lead

- Opportunity

- Service Request

Metrics

The complete list of metrics for this subject area is as follows:

- Activity Metrics

  - Number (#) of Activities

  - Number (#) of Open Activities

  - Number (#) of Accounts with Activities

  - Number (#) of Closed Activities

- Quota Metrics

  - Quota Value

Usage Notes

The Account, Activity, Contact and Service Request dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Advanced Custom Objects Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides the ability to analyse advanced custom objects.

Advanced Custom Objects area is a specialised subject area that allows the reporting of the one-to-many and many-to-one relationship between Custom Objects 4 through 25 and prebuilt objects, including Custom Objects 1,2, and 3. Because the Advanced Custom Objects area unites the reporting of all objects under a single subject area, it is necessary to include a determining metric for the report to help it choose a relationship path among the objects included in the report. Whenever two or more dimensions are in a report, Oracle CRM On Demand analytics requires a metric to relate the dimensions. If the report does not include a

metric, Oracle CRM On Demand analytics chooses one randomly. The reporting of the many-to-many relationship is not possible using this subject area because it is not directly supported by Oracle CRM On Demand for Custom Objects 4 through 25.

The many-to-many relationship is implemented for Custom Objects 1,2, and 3 and account, contact, service request, and opportunity in Analytics. Hence, it is possible to report on the one-to-many relationship only between Custom Objects 1,2, and 3 and these objects. It is not possible to report on the one-to-many relationship between Custom Objects 1,2, and 3 and activities, assets, leads, and products.

Relationship Type

Federated

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Allocation
- Campaign
- Claim
- Contact
- Coverage
- Custom Object 1
- Custom Object 2
- Custom Object 3
- Custom Object 04
- Custom Object 05
- Custom Object 06
- Custom Object 07
- Custom Object 08
- Custom Object 09
- Custom Object 10
- Custom Object 11
- Custom Object 12
- Custom Object 13
- Custom Object 14
- Custom Object 15
- Custom Object 16
- Custom Object 17
- Custom Object 18
- Custom Object 19
- Custom Object 20
- Custom Object 21
- Custom Object 22
- Custom Object 23
- Custom Object 24

- Custom Object 25

- Damage

- Financial Account

- Financial Account Holder

- Financial Account Holding

- Financial Plan

- Financial Product

- Financial Transaction

- Household

- Insurance Property

- Inventory Period

- Involved Party

- Lead

- Opportunity

- Partner

- Policy

- Policy Holder

- Portfolio

- Product

- Sample Inventory

- Sample Transaction

- Service Request

- Solution

- Transaction Item

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account

- Activity

- Allocation

- Campaign

- Claim

- Contact

- Coverage

- Custom Objects 1-25

- Damage

- Financial Account

- Financial Account Holder

- Financial Account Holding

- Financial Plan

- Financial Product

- Financial Transaction

- Insurance Property

- Inventory Period

- Involved Party

- Lead

- Opportunity

- Policy

- Policy Holder

- Sample Inventory

- Sample Transaction

- Service Request

- Solution

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics

  - Account Custom Metrics

  - Number (#) of Accounts

- Activity Metrics

  - Number (#) of Accounts with Activities

  - Number (#) of Activities

- Number (#) of Closed Activities

- Number (#) of Open Activities

- Allocation Metrics

  - Number (#) of Allocation

  - Average Maximum Quantity (Avg MaxQty) Allocation

  - Average Maximum Quantity (Avg MaxQty) Call

  - Average (Avg) Order By

  - Sum Maximum Quantity (MaxQty) Allocation

  - Sum Maximum Quantity (MaxQty) Call

  - Sum Order By

- Campaign Metrics

  - Number (#) of Accounts for Campaign

  - Number (#) of Campaigns

  - Number (#) of Campaigns Active

  - Number (#) of Campaigns Completed

  - Number (#) of Campaigns Planned

  - Number (#) of Contacts for Campaign

  - Number (#) of Leads for Campaign

  - Number (#) of Opportunities for Campaign

  - Number (#) of Wins for Campaign

  - Percentage (%) of Budget (Definition: The cost multiplied by 100, then divided by the budgeted cost.)

  - Percentage (%) of Lead Target Achieved (Definition: The number of leads multiplied by 100, then divided by the lead target.)

  - Percentage (%) of Revenue Target Achieved (Definition: The closed revenue multiplied by 100, then divided by the revenue target.)

  - Average (Avg) Days to Close Opportunity (Opty) for Campaign

  - Average (Avg) Closed Revenue for Campaign

  - Average (Avg) Days to Close Opportunity (Opty) for Campaign

  - Average (Avg) Cost Per Closed Sale (Definition: The average cost divided by the number of wins.)

  - Average (Avg) Cost Per Lead (Definition: The average cost divided by the number of leads.)

  - Closed Revenue for Campaign

  - Cost per Closed Sale (Definition: The cost divided by the number of wins.)

  - Cost per Lead (Definition: The cost divided by the number of leads.)

  - Lead Conversion Rate for Campaign

- Opportunity Revenue for Campaign
- Opportunity Win Rate for Campaign
- Return On Investment (ROI)

- Claim Metrics
  - Claim Custom Metrics
  - Number (#) of Claims
  - Average (Avg) Amount of Liability
  - Average (Avg) Amount of Loss
  - Average (Avg) Employee Injured Number
  - Average (Avg) People Injured Number
  - Sum Amount of Liability
  - Sum Amount of Loss
  - Sum Employee Injured Number
  - Sum People Injured Number
- Contact Metrics
  - Contact Custom Metrics
  - Number (#) of Contacts

- Coverage Metrics
  - Coverage Custom Metrics
  - Number (#) of Coverages
  - Average (Avg) Deductible
  - Average (Avg) Individual Limit
  - Average (Avg) Insured Amount
  - Average (Avg) Total Limit
  - Sum Deductible
  - Sum Individual Limit
  - Sum Insured Amount
  - Sum Total Limit

- Custom Object 1-25 Metrics
  - Custom Object 1-25 Custom Metrics

- Number (#) of Custom Objects 1-25
- Damage Metrics
    - Damage Custom Metrics
        - Number (#) of Damages
        - Average (Avg) Estimate Amount
        - Average (Avg) Property Number
        - Sum Estimate Amount
        - Sum Property Number
- Financial Account Metrics
    - Financial Account Custom Metrics
    - Number (#) of Financial Accounts
    - Average (Avg) Balance
    - Sum Balance
- Financial Account Holder Metrics
    - Financial Account Holder Custom Metrics
    - Number (#) of Financial Account Holders
- Financial Account Holding Metrics
    - Financial Account Holder Custom Metrics
    - Number (#) of Financial Account Holdings
    - Average (Avg) Performance
    - Average (Avg) Purchase Price
    - Average (Avg) Quantity
    - Average (Avg) Value
    - Sum Performance
    - Sum Purchase Price
    - Sum Quantity
    - Sum Value
- Financial Plan Metrics
    - Financial Plan Custom Metrics
    - Number (#) of Financial Plans
- Financial Product Metrics
    - Financial Product Custom Metrics
    - Number (#) of Financial Products

- Average (Avg) Current Price

- Sum Current Price

- Financial Transaction Metrics

  - Financial Transaction Custom Metrics

  - Number (#) of Financial Transactions

  - Average (Avg) Quantity

  - Average (Avg) Transaction Price

  - Average (Avg) Value

  - Sum Quantity

  - Sum Transaction Price

  - Sum Value

- Household Metrics

  - Household Custom Metrics

  - Total Contact Assets

    - Average (Avg) Total Assets

    - Average (Avg) Total Assets (000)

    - Total Assets

    - Total Assets (000)

  - Total Contact Expenses

    - Average (Avg) Total Expenses

    - Average (Avg) Total Expenses (000)

    - Total Expenses

    - Total Expenses (000)

  - Total Contact Income

    - Average (Avg) Total Income

    - Average (Avg) Total Income (000)

    - Total Income

    - Total Income (000)

  - Total Contact Liabilities

    - Average (Avg) Total Liabilities

    - Average (Avg) Total Liabilities (000)

    - Total Liabilities

- Total Liabilities (000)
- Total Contact Net Worth
  - Average (Avg) Total Net Worth
  - Average (Avg) Total Net Worth (000)
  - Total Net Worth
  - Total Net Worth (000)
- Total Household Assets
  - Average (Avg) Total Household Assets
  - Average (Avg) Total Household Assets (000)
  - Total Household Assets
  - Total Household Assets (000)
- Total Household Expenses
  - Average (Avg) Total Household Expenses
  - Average (Avg) Total Household Expenses (000)
  - Total Household Expenses
  - Total Household Expenses (000)
- Total Household Income
  - Average (Avg) Total Household Income
  - Average (Avg) Total Household Income (000)
  - Total Household Income
  - Total Household Income (000)
- Total Household Liabilities
  - Average (Avg) Total Household Liabilities
  - Average (Avg) Total Household Liabilities (000)
  - Total Household Liabilities
  - Total Household Liabilities (000)
- Total Household Net Worth
  - Average (Avg) Total Household Net Worth
  - Average (Avg) Total Household Net Worth (000)
  - Total Household Net Worth
  - Total Household Net Worth (000)
- Number (#) of Contact Leads
- Number (#) of Contact Service Requests

- Number (#) of Contacts

- Number (#) of Households

- Number (#) of Rolled Up Contacts

- Number (#) of Rolled Up Leads

- Number (#) of Rolled Up Service Requests

- Insurance Property Metrics

  - Insurance Property Custom Metrics

  - Number (#) of Insurance Properties

  - Average (Avg) Amount

  - Average (Avg) Sequence

  - Sum Amount

  - Sum Sequence

- Inventory Period Metrics

  - Inventory Period Custom Metrics

  - Number (#) of Inventory Period

- Involved Party Metrics

  - Involved Party Custom Metrics

  - Number (#) of Involved Parties

- Lead Metrics

  - Number (#) of Archived Leads

  - Number (#) of Leads

  - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)

  - Number (#) of Leads Resulting in Lost Opportunity

  - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)

  - Number (#) of New Opportunities

  - Number (#) of Qualified Leads

  - Number (#) of Rejected Leads

  - Number (#) of Wins

  - Closed Revenue for Lead

  - Expected Revenue for Lead

  - Opportunity Revenue for Lead

- Opportunity Metrics
    - Opportunity Custom Metrics
    - Number (#) of Closed Opportunities
    - Number (#) of Open Opportunities
    - Number (#) of Opportunities
    - Number (#) of Wins
    - Average (Avg) Number (#) of Days in Stage
    - Closed Revenue
    - Closed Revenue (000)
    - Expected Revenue
    - Expected Revenue (000)
    - Revenue
    - Revenue (000)
- Partner Metrics
    - Partner Custom Metrics
    - Number (#) of Partners
- Policy Metrics
    - Policy Custom Metrics
    - Number (#) of Policies
    - Average (Avg) Face Amount
    - Average (Avg) Modal Premium
    - Average (Avg) Total Premium
    - Sum Face Amount
    - Sum Modal Premium
    - Sum Total Premium
- Policy Holder Metrics
    - Policy Holder Custom Metrics
    - Number (#) of Policy Holders
    - Average (Avg) Holder Percentage
    - Sum Holder Percentage
- Portfolio Metrics
    - Portfolio Custom Metrics
    - Number (#) of Portfolios

- Average (Avg) Credit Limit
- Average (Avg) Face Value
- Average (Avg) Loan Amount
- Average (Avg) Premium
- Average (Avg) Revenue
- Average (Avg) Total Asset Value
- Credit Limit
- Face Value
- Loan Amount
- Premium
- Revenue
- Total Asset Value

- Sample Inventory Metrics
  - Sample Inventory Custom Metrics
  - Number (#) of Sample Inventory
  - Average (Avg) Last Physical Count
  - Average (Avg) Opening Balance
  - Average (Avg) Physical Count
  - Average (Avg) System Count
  - Sum Last Physical Count
  - Sum Opening Balance
  - Sum Physical Count
  - Sum System Count

- Sample Transaction Metrics
  - Sample Transaction Custom Metrics
  - Number (#) of Sample Transaction
  - Average (Avg) Packages Received
  - Average (Avg) Packages Sent
  - Sum Packages Received
  - Sum Packages Sent

- Service Request Metrics
  - Service Request Custom Metrics
  - Number (#) of Cancelled SRs

- - Number (#) of Closed SRs

  - Number (#) of Open SRs

  - Number (#) of Pending SRs

  - Number (#) of SRs

  - Average (Avg) Days to Close SR

  - Average (Avg) Open SR Age

- Solution Metrics

  - Solution Custom Metrics

  - Number (#) of Approved Solutions

  - Number (#) of Obsolete Solutions

  - Number (#) of Published Solutions

  - Number (#) of Solutions

- Transaction Item Metrics

  - Transaction Item Custom Metrics

  - Number (#) of Transaction Item

  - Average (Avg) Line Number

  - Average (Avg) Quantity

  - Average (Avg) Shipped Quantity

  - Sum Line Number

  - Sum Quantity

  - Sum Shipped Quantity

Usage Notes

The Portfolio dimension normally includes non-financial assets such as vehicles unless your administrator has specifically excluded such non-financial assets in Portfolio lists using the Exclude Vehicle / Asset Records from Portfolio Accounts option in the Company Profile page.

Reports with no results can occur due to several reasons. One reason is the lack of a metric in the report. Your report must contain at least one metric.

You can also get a report with no results if you are using two custom objects that are not directly linked to each other. For example, if an Account object is directly associated to Custom Object 4 and Custom Object 5, then you can report on the association between Account and Custom Object 4 as well as the association between Account and Custom Object 5. However, you cannot report on the combined association among Account, Custom Object 4, and Custom Object 5 unless there is a direct association between Custom Object 4 and Custom Object 5 defined in the application.

Taking this example further, if an Account object is directly associated to Custom Object 4 and Custom Object 4 is directly associated to Custom Object 5, then you can report on the association between Account and Custom Object 4 as well as the association between Custom Object 4 and Custom Object 5. However, the

combined association between Account, Custom Object 4, and Custom Object 5 cannot be reported on unless there is a direct association between Account and Custom Object 5 as defined in the application.

The Account, Activity, Contact, and Service Request dimensions include a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

The Portfolio dimension is not mapped to Custom Objects 16-20. It is mapped to Custom Objects 1-15 and Custom Objects 21-25.

Associated Object Custom Fields

An associated object's custom fields are not available for use in reports in the Advanced Custom Objects reporting subject area. For example, if you create a field for a custom object as a related field of another custom object, then the new field is not available under the main object folder in the Advanced Custom Objects reporting subject area. However, the new field remains available in the related object's folder.

Advanced Custom Object Subject Area and the Financials and Insurance Objects

The Advanced Custom Objects subject area enables you to report on all the attributes and metrics of the objects that exist in the subject area. It also enables you to report on the associations between these objects. However, for any given pair of objects, only one association is supported in this subject area. For example:

- The FinancialAccount object can be a child object of an account, a branch, and a financial Institution. However, only the account object association can be reported.

- The FinancialAccount object can be a child object of a contact and an advisor. However, only the contact object association can be reported.

- The Policy object can be a child object of an account, an agency, and a carrier. However, only the account object association can be reported.

- The Policy object can be a child object of a contact, an agent, and a carrier underwriter. However, only the account object association can be reported.

The association between the financial objects and custom objects 1-25 and the association between the insurance objects and custom objects 1-25 are not available for reporting from the Advanced Custom Object subject area.

Field Formats

In the financial, insurance, and sample dimensions, the currency and date fields are preformatted. Other field types in those dimensions, such as integer and percentage, are not preformatted. You can apply custom formats to these fields. This formatting approach affects the following dimensions and metrics:

- Allocation

- Allocation Metrics

- Claim

- Claim Metrics

- Coverage

- Coverage Metrics

Reports

- Damage
- Damage Metrics
- Financial Account
- Financial Account Metrics
- Financial Account Holder
- Financial Account Holder Metrics
- Financial Account Holding
- Financial Account Holding Metrics
- Financial Plan
- Financial Plan Metrics
- Financial Product
- Financial Product Metrics
- Financial Transaction
- Financial Transaction Metrics
- Insurance Property
- Insurance Property Metrics
- Involved Party
- Involved Party Metrics
- Inventory Period
- Inventory Period Metrics
- Policy
- Policy Metrics
- Policy Holder
- Policy Holder Metrics
- Sample Inventory
- Sample Inventory Metrics
- Sample Transaction
- Sample Transaction Metrics
- Transaction Item
- Transaction Item Metrics

Assessments Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides real-time analytics of the assessment usage and results. You can get full visibility to assessment completion, scoring, and interaction on the other related dimensions, such as activities, contacts, and accounts.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics.* Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Assessment
- Business Plan
- Contact
- Date Last Modified
- Date Started
- Lead
- Objective
- Opportunity
- Service Request

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account
- Activity
- Contact
- Lead
- Opportunity
- Service Request

Metrics

The complete list of metrics for this subject area is as follows:

- Assessment Metrics
  - Answers
    - Number (#) of Criteria Answers
    - Answer Completed
    - Answer Not Completed
  - Criteria
    - Number (#) of Script Criteria
    - Average Number (Avg #) of Script Criteria
    - Average (Avg) Criteria Score
    - Criteria Score
    - Maximum (Max) Criteria Score
    - Minimum (Min) Criteria Score
  - Script
    - Number (#) of Times Script Used
    - Percentage (%) Completed
    - Actual Script Score
    - Average (Avg) Actual Script Score
    - Average (Avg) Threshold Script Score
    - Maximum (Max) Actual Script Score
    - Minimum (Min) Actual Script Score
    - Threshold Script Score
  - Assessment ID

Usage Notes

You can use the Assessment metrics only with the Assessments dimension. If some assessment metrics are deleted, then previously completed assessments do not reflect the deletion, and the results might appear to be inaccurate. You must include at least one metric for reports when you are using this subject area. If you do not want the metric to appear, then you can hide it.

Within the Assessments dimension are folders for Answer and Criteria. The fields within those folders do not have any intersections with the metrics and thus do not produce any values.

The Activity and Service Request dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Assets Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyse asset metrics by account, asset, product and user dimensions. It allows you to track assets and products that were sold to a customer or company. This is one of the few subject areas where the visibility to the asset records is based on the visibility of the associated account records.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type

Record Type	Oracle CRM On Demand Answers Coverage
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

■ Account

■ Asset

■ Owned By User

■ Product

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

■ Account

■ Asset

Metrics

The complete list of metrics for this subject area is as follows:

■ Asset Metrics

■ Number (#) of Assets

■ Average Number (Avg #) of Assets

Usage Notes

You can analyse the Asset metrics by the Owned By User dimension. The Account dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Business Planning Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides the ability to look at accounts, contacts, opportunities, and products within the context of business plans, objectives, plan types, periods, revenue goals, and units of measure. It also provides the ability to review actual performance compared to goals and objectives established within business plans. Results can be combined with queries from other subject areas for comparing the results with the target goals.

Relationship Type

One to many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type

Record Type	Oracle CRM On Demand Answers Coverage
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Book
- Business Plan
- Contact
- Custom Object 1
- Custom Object 2
- Custom Object 3
- Lead
- Objective
- Opportunity
- Period
- Plan Account
- Plan Contact
- Plan Opportunity
- Principal Partner Account
- Product
- Service Request

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account

- Activity
- Contact
- Lead
- Opportunity
- Service Request

Metrics

The list of metrics for this subject area is as follows:

- Account Metrics
- Activity Metrics
- Business Plan Metrics
- Contact Metrics
- Custom Object 1 Metrics
- Custom Object 2 Metrics
- Custom Object 3 Metrics
- Lead Metrics
- Objective Metrics
- Opportunity Metrics
- Partner Metrics
- Period Metrics
- Plan Account Metrics
- Plan Contact Metrics
- Plan Opportunity Metrics
- Service Request Metrics

Usage Notes

This subject area has multiple dimensions, but you must use care not to mix dimensions indiscriminately. Not all combinations of dimensions yield useful results. The following list shows the driving-object dimension in bold font and which dimensions can be combined with it to produce valid results.

- **Account:** Objective, Plan Account
- **Activity:** Business Plan, Objective
- **Business Plan:** Activity, Objective, Partner, Period, Plan Account, Plan Contact, Plan Opportunity, Product
- **Contact:** Objective, Plan Contact
- **Lead:** Objective

- **Objective:** Account, Activity, Business Plan, Contact, Lead, Period, Product, Service Request
- **Opportunity:** Objective, Plan Opportunity
- **Partner:** Business Plan
- **Period:** Business Plan, Objective
- **Plan Account:** Account, Business Plan
- **Plan Contact:** Business Plan, Contact
- **Plan Opportunity:** Business Plan, Opportunity
- **Product:** Business Plan, Plan Contact
- **Service Request:** Objective

Note: When mixing dimensions in a report make sure to include metrics from these dimensions so that Oracle CRM On Demand can make the correct joins. For example, if the driving dimension is Objective and you want to use some Contact fields, then you must also include an objective metric in your query. You can suppress the printing of the metric, but it must be in the query.

The Book dimension enables you to analyse metrics and related attributes of accounts and contacts at any level of the book hierarchy.

The Activity and Service Request dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Campaigns Reporting Subject Area

Availability
This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose
This subject area enables the comprehensive analysis of campaigns by campaign, user, and date dimensions. It allows you to analyse campaign results, performance, and return on investment (ROI). It also contains metrics to help you to solve problems in achieving campaign goals and optimising future campaigns.

Relationship Type
Simple

Optimised Custom Fields
This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the

optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

■ Campaign

■ Date

■ Owned By User

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Campaign dimension has the Campaign Type field. There is also a Campaign Type Code field, which is the optimised version of the Campaign Type field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For more information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimension in this subject area has optimised filtering fields:

■ Campaign

Metrics

The complete list of metrics for this subject area is as follows:

- Campaign Metrics

    - Number (#) of Campaigns

    - Number (#) of Campaigns Planned

    - Number (#) of Campaigns Active

    - Number (#) of Campaigns Completed

    - Number (#) of Accounts for Campaign

    - Number (#) of Contacts for Campaign

    - Number (#) of Leads for Campaign

    - Number (#) of Opportunities for Campaign

    - Number (#) of Wins for Campaign

    - Percentage (%) of Budget (Definition: The cost multiplied by 100, then divided by the budgeted cost.)

    - Percentage (%) of Lead Target Achieved (Definition: The number of leads multiplied by 100, then divided by the lead target.)

    - Percentage (%) of Revenue Target Achieved (Definition: The closed revenue multiplied by 100, then divided by the revenue target.)

    - Average (Avg) Days to Close Opportunity (Opty) for Campaign

    - Cost per Closed Sale (Definition: The cost divided by the number of wins.)

    - Average (Avg) Cost Per Closed Sale (Definition: The average cost divided by the number of wins.)

    - Cost per Lead (Definition: The cost divided by the number of leads.)

    - Average (Avg) Cost Per Lead (Definition: The average cost divided by the number of leads.)

    - Lead Conversion Rate for Campaign

    - Closed Revenue for Campaign

    - Opportunity Revenue for Campaign

    - Average (Avg) Closed Revenue for Campaign

    - Opportunity Win Rate for Campaign

    - ROI

Usage Notes

None

Contact Relationships Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

The Contact Relationship Reporting subject area provides the ability to analyse contact relationships. You can analyse contact relationships by account, contact, and related contact. This subject area has no metrics.

Relationship Type

Many-to-many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics.* Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Account
- Contact
- Owned By User
- Related Contact

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account
- Contact

Metrics

None

Usage Notes

The Account and Contact dimensions include a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

The Contact Relationships subject area reports on the many-to-many relationships between the relationships of contacts with other contacts. You cannot use it to report on the many-to-many relationships between accounts and contacts. For many-to-many relationships between accounts and contacts, use the Account Contact History Analytic subject area (on page 960).

Contacts Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

You can use this subject area to report on contact metrics by contact, account, campaign, owned by user, and date dimensions. The level of detail for this subject area is one row for each contact created in Oracle CRM On Demand. This subject area allows you to quickly answer questions such as the following: Who are the top ten employees with the largest contacts? Which accounts do not have any contacts? Which are the largest campaigns by contacts?

Relationship Type

Simple Multi-fact

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type

Record Type	Oracle CRM On Demand Answers Coverage
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Account
- Campaign
- Contact
- Date Created
- Owned By User

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimised version of the Last Call Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account
- Campaign

Metrics

The complete list of metrics for this subject area is as follows:

- Contact Metrics
  - Contact Custom Metrics
    - Indexed Currency
    - Average (Avg) Indexed Currency
    - Indexed Number
    - Average (Avg) Indexed Number
  - Number (#) of Contacts

Usage Notes

The Account and Contact dimensions include a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Custom Objects and Accounts Reporting Subject Area

This topic covers the following reporting subject areas:

- Custom Object 1 and Accounts

- Custom Object 2 and Accounts

- Custom Object 3 and Accounts

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

These subject areas allow you to analyse the many-to-many relationship between accounts and Custom Objects 1, 2, and 3. The account subject area is replicated and added with the Custom Objects 1, 2, and 3 dimensions. Often companies redesign Custom Objects 1, 2, and 3 and want to report on these redesigned objects with accounts. Because this subject area represents the many-to-many relationship between accounts and Custom Objects 1, 2, and 3, the accounts that do not have an association with at least one instance of Custom Objects 1, 2, and 3 cannot be reported using these subject areas.

Relationship Type

Many-to-many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

These subject areas have the following dimensions:

■ Account

■ Campaign

■ Custom Object

■ Date Created

■ Owned By User

■ Territory

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimised version of the Last Call Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

■ Account

■ Campaign

■ Custom Object 1

■ Custom Object 2

- Custom Object 3

Metrics

The complete list of metrics for these subject areas is as follows:

- Account Metrics

  - Account Custom Metrics

    - Indexed Currency

    - Average (Avg) Indexed Currency

    - Indexed Number

    - Average (Avg) Indexed Number

  - Revenue

  - Revenue (000)

  - Average (Avg) Revenue

  - Closed Revenue

  - Closed Revenue (000)

  - Average (Avg) Closed Revenue

  - Average (Avg) Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)

  - Number (#) of Accounts

  - Number (#) of Accounts with Opportunities

  - Number (#) of Contacts

  - Number (#) of Opportunities

  - Number (#) of Wins

  - Number (#) of Service Requests (SRs)

  - Number (#) of Cancelled SRs

  - Number (#) of Closed SRs

  - Number (#) of Open SRs

  - Number (#) of Pending SRs

  - Average (Avg) Open SR Age

  - Average (Avg) Days to Close SR

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Custom Objects and Contacts Reporting Subject Area

This topic covers the following reporting subject areas:

- Custom Object 1 and Contacts
- Custom Object 2 and Contacts
- Custom Object 3 and Contacts

Availability

These subject areas are available in all editions of Oracle CRM On Demand.

Business Purpose

These subject areas allow you to analyse the many-to-many relationship between contacts and Custom Objects 1, 2, and 3. The contact subject area is replicated and added with the Custom Objects 1, 2, and 3 dimensions. Often companies redesign Custom Objects 1, 2, and 3 and want to report on these redesigned objects with contacts. Because this subject area represents the many-to-many relationship between contacts and Custom Objects 1, 2, and 3, contacts that do not have an association with at least one instance of Custom Objects 1, 2, and 3 cannot be reported using these subject areas.

Relationship Type

Many-to-many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

These subject areas have the following dimensions:

- Account
- Campaign
- Contact
- Custom Object
- Date Created
- Owned By User

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimised version of the Last Call Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account
- Campaign
- Contact
- Custom Object 1
- Custom Object 2
- Custom Object 3

Metrics

The complete list of metrics for these subject areas is as follows:

- Contact Metrics
    - Contact Custom Metrics
        - Indexed Currency
        - Average (Avg) Indexed Currency
        - Indexed Number
        - Average (Avg) Indexed Number
    - Number (#) of Contacts

Usage Notes

The Account and Contact dimensions include a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Custom Objects and Opportunities Reporting Subject Area

This topic covers the following reporting subject areas:

- Custom Object 1 and Opportunities
- Custom Object 2 and Opportunities
- Custom Object 3 and Opportunities

Availability

These subject areas are available in all editions of Oracle CRM On Demand.

Business Purpose

These subject areas allow you to analyse the many-to-many relationship between opportunities and Custom Objects 1, 2, and 3. The opportunities subject area is replicated and added with the Custom Objects 1, 2, and 3 dimensions. Often companies redesign Custom Objects 1, 2, and 3 and want to report on these redesigned objects with opportunities. Because this subject area represents the many-to-many relationship between opportunities and Custom Objects 1, 2, and 3, the opportunities that do not have an association with at least one instance of Custom Objects 1, 2, and 3 cannot be reported using these subject areas.

Relationship Type

Many-to-many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

These subject areas have the following dimensions:

- Custom Object
- Account
- Campaign
- Close Date
- Date Opened
- Opportunity
- Owned By User
- Primary Contact

■ Territory

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimised version of the Last Call Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

■ Account

■ Campaign

■ Contact

■ Custom Object 1

■ Custom Object 2

■ Custom Object 3

■ Opportunity

Metrics

The complete list of metrics for these subject areas is as follows:

■ Opportunity Metrics

   ■ Opportunity Custom Metrics

      ■ Indexed Currency

      ■ Average (Avg) Indexed Currency

      ■ Indexed Number

      ■ Average (Avg) Indexed Number

   ■ Revenue

   ■ Expected Revenue

   ■ Closed Revenue

   ■ Revenue (000)

   ■ Expected Revenue (000)

   ■ Closed Revenue (000)

   ■ Number (#) of Opportunities

   ■ Number (#) of Open Opportunities

   ■ Number (#) of Closed Opportunities

■ Number (#) of Wins

■ Average Number (Avg #) of Days in Stage

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Custom Objects and Service Requests Reporting Subject Area

This topic covers the following reporting subject areas:

■ Custom Object 1 and Service Requests

■ Custom Object 2 and Service Requests

■ Custom Object 3 and Service Requests

Availability

These subject areas are available in all editions of Oracle CRM On Demand.

Business Purpose

These subject areas allow you to analyse the many-to-many relationship between service requests and Custom Objects 1, 2, and 3. The service requests subject area is replicated and added with the Custom Objects 1, 2, and 3 dimensions. Often companies redesign Custom Objects 1, 2, and 3 and want to report on these redesigned objects with service requests. Because this subject area represents the many-to-many relationship between opportunities and Custom Objects 1, 2, and 3, the service requests that do not have an association with at least one instance of Custom Objects 1, 2, and 3 cannot be reported using these subject areas.

Relationship Type

Many-to-Many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

These subject areas have the following dimensions:

- Account
- Contact
- Custom Object
- Date Closed
- Date Opened
- Owned By User
- Service Request

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimised version of the Last Call Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account

- Contact
- Custom Object 1
- Custom Object 2
- Custom Object 3
- Service Request

Metrics

The complete list of metrics for these subject areas is as follows:

- Service Request Metrics
    - Service Request Custom Metrics
        - Indexed Currency
        - Average (Avg) Indexed Currency
        - Indexed Number
        - Average (Avg) Indexed Number
    - Number (#) of Service Requests (SRs)
    - Number (#) of Open SRs
    - Number (#) of Closed SRs
    - Number (#) of Pending SRs
    - Number (#) of Cancelled SRs
    - Average (Avg) Open SR Age
    - Average (Avg) Days to Close SR

Usage Notes

The Account, Contact, and Service Request dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Custom Objects Reporting Subject Area

This topic covers the following reporting subject areas:

- Custom Object 1
- Custom Object 2
- Custom Object 3

Availability

These subject areas are available in all editions of Oracle CRM On Demand.

Business Purpose

These subject areas allow you to report on Custom Objects 1, 2, and 3 metrics by account, activity, campaign, contact, lead, opportunity, service request, partner, date, and Custom Objects 1, 2, and 3 dimensions. They offer the ability to analyse Custom Objects 1, 2, and 3 metrics by various related objects. The reporting of Custom Objects 1, 2, and 3 is currently available only in real time. When analysing Custom Objects 1, 2, and 3, use only these subject areas.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Service Request	All optimised fields

Dimensions

These subject areas have the following dimensions:

■ Account

■ Activity

■ Campaign

■ Contact

■ Created Date

■ Custom Object 1

■ Custom Object 2

■ Custom Object 3

■ Lead

■ Opportunity

■ Owned By User

■ Partner (available only in Oracle CRM On Demand Partner Relationship Management Edition)

■ Service Request

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

■ Account

■ Activity

■ Campaign

■ Contact

■ Custom Object 1

■ Custom Object 2

■ Custom Object 3

■ Lead

■ Opportunity

■ Service Request

Metrics

The complete list of metrics for these subject areas is as follows:

■ Custom Object Metrics

■ Custom Object Custom Metrics

■ Indexed Currency

■ Average (Avg) Indexed Currency

■ Indexed Number

■ Average (Avg) Indexed Number

■ Number (#) of Custom Objects

Usage Notes

The Account, Activity, Contact, and Service Request dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Events Reporting Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Life Sciences Edition.

Business Purpose

Use this subject area to report on event and related dimensions, such as book, date, invitees, owned by user, product category and product.

Relationship Type

One to Many

Dimensions

This subject area has the following dimensions:

■ Book

■ Date

- Event

- Invitees

- Owned By User

- Product

- Product Category

Metrics

The complete list of metrics for this subject area is as follows:

- Event Metrics

  - Number (#) of Events

  - Number (#) of Invitees
    (Definition: Number of active invitees not having a deleted status.)

  - Budget Surplus/Shortfall

    (Definition: The difference between the event budget and the event cost.)

  - Event Budget

    The Event Budget metric comes from the dimension. When only the Event dimension is used the metric is the sum of the dimension field value. However, when other dimensions (particularly invitee) are used, the metric is calculated as the budget amount divided by number of invitees.

  - Event Cost

    (Definition: The per attendee cost of an event, which is the total cost of the activities for all active attendees associated with a completed event, divided by the number of attendees.)

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Date

- Event

Usage Notes

None

Forecasts Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to report on the data generated by the Oracle CRM On Demand Forecast Module. It also allows you to compare the forecasting summary with the latest real-time opportunity data by account, territory, user, opportunity, product, date, and user quota dimensions. You can create a performance report for a sales team, showing the pipeline coverage, quota attainment, and forecast accuracy. It also allows sales managers to monitor the performance of individual team members, using the user hierarchy.

Relationship Type

Multi-Fact

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type

Record Type	Oracle CRM On Demand Answers Coverage
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Account
- Account Revenue (see Note 1)
- Account Territory
- Book
- Close Date (see Note 2)
- Contact
- Forecast
- Forecast Date (see Note 3)
- Opportunity (see Note 4)
- Opportunity Product Revenue (see Note 4)
- Owned By User
- Product
- Product Category
- Quota

Note 1: You cannot combine the Account Revenue dimension with the Opportunity or the Opportunity Product dimensions.

Note 2: For quotas, the close date is the first day of the month for the quota period. For forecasts, the close date is the closed date for the opportunities that are in the forecast snapshots. For opportunities, the closed date is the closed date for the opportunity.

Note 3: The forecast date is the date when the forecast was run. An opportunity can be in multiple forecasts.

Note 4: Opportunity and Opportunity Product Revenue can be associated only with the Opportunity and Opportunity Product Revenue metrics.

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimised version of the Last Call Date field. Using

the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account

- Contact

- Opportunity

Metrics

The complete list of metrics for this subject area is as follows:

- Account Revenue Metrics

  - Number (#) of Products

  - Average Number (Avg #) of Products

- Forecast Metrics

  - My Account Revenues

    - My Account Revenue

  - My Contact Revenues

    - My Contact Revenue

  - My Opportunities

    - My Opportunity Revenue

  - My Product Revenues

    - My Product Revenue

  - My Products

    - Closed Quantity

    - Closed Revenue

    - Expected Revenue

    - Forecasted Quantity

    - Pipeline Quantity

  - Team Summary

    - Forecast

    - Closed Revenue

    - Pipeline

    - Best Case

  - Team Product Summary

    - Closed Quantity

- - Forecasted Quantity
  - Pipeline Quantity
  - Closed Revenue
  - Expected Revenue
- Closed Revenue
- Pipeline
- Forecast
- Expected Revenue
- Best Case
- Quota Metrics
  - Quota Value
- Opportunity Metrics
  - Opportunity Custom Metrics
    - Indexed Number
    - Average (Avg) Indexed Number
    - Indexed Number
    - Average (Avg) Indexed Number
  - Revenue
  - Expected Revenue
  - Closed Revenue
  - Revenue (000)
  - Expected Revenue (000)
  - Closed Revenue (000)
  - Number (#) of Opportunities
  - Number (#) of Open Opportunities
  - Number (#) of Closed Opportunities
  - Number (#) of Wins
  - Average Number (Avg #) of Days in Stage
- Opportunity Product Revenue Metrics
  - Number (#) of Products
  - Average Number (Avg #) of Products

Usage Notes

The following restrictions apply:

- **Multi-Fact.** Because the Forecasts subject area is a Multi-Fact subject area, you must ensure there is only one metric as part of a report.

- **Book dimension.** The book dimension and hierarchy allow you to group data records into books. But the data that you can see is still governed by your visibility mode in Analytics. It works only with account, account revenue, opportunity, and opportunity-product.

- **Hierarchies.** All hierarchies are limited to eight levels.

- **Revenue Split.** When the revenue split feature is configured (see Setting Up Your Company Profile and Global Defaults), the forecast summary reflects the split, but the real-time opportunity metrics do not.

- **Quota Metrics.** Comparing quota metrics to other metrics is only valid at the month level and user level.

- **Forecast summary custom fields.** These fields are not available for reporting. The forecast summary generated by Oracle CRM On Demand contains rolled-up totals. Therefore, the forecast metrics in your report make sense only if you view the data by user. Viewing the forecast metrics without the user causes the value to appear incorrect.

- **Opportunity and multiple forecasts.** The same opportunity can appear in multiple forecasts. Therefore, forecast metrics must be viewed by a specific date, using the filtered-metric mechanism. Without doing this, the forecast metrics might appear incorrect.

- **Forecast and user quota metrics.** The data for revenues is the same as the forecast summary date, so all opportunities appear to be on the first day of the month. The user quota is also set for a monthly period and appears on the first day of the month. For this reason, reports that include forecast and user quota metrics make sense only if the data is aggregated for the month or at a higher level.

- **User quota metrics.** Visibility to user quota metrics is controlled using the Manager visibility regardless of the user's visibility. Hence, it is not possible for users who are not company administrators to report user quotas along with opportunity metrics when their visibility is set to Team visibility.

- **User's percentile ranking.** You cannot build a user's percentile ranking without having access to all the underlying data.

- **Calendar month and multiple forecasts.** Each calendar month can have multiple forecasts. So, a report showing the total forecast metrics must be qualified by a specific forecast date.

- **Quota and Revenue.** If your report showing the user quota and real-time opportunity revenue does not show the expected results, then it could be because there are no records that have opportunity closed dates in the same period as the quota records.

- **Monthly Forecast.** Your monthly forecast summary totals are already rolled up. So, a total for all users gives incorrect results. If you want to obtain the total this way, you must use the revenue metrics from the My Revenues folder.

- **Analytics Manager Visibility.** Use Analytics Manager Visibility if the forecast includes only people who report to you.

- **Analytics Team Visibility.** Use the Analytics Team Visibility if those people in the forecast are part of your team. If the people in the forecast are neither in your team, nor reporting to you, then the opportunity and opportunity product view does not match the forecast summary.

- **Forecast metrics**. The forecast metrics must reference a specific forecast. Use the FILTER metric function to reference the metrics by forecast date and forecast type. For example, use the FILTER metric function

to obtain the forecast value for a specific forecast date, such as Sep 16, 2009. Because there are multiple forecast types, add a further filter to get only the values for Opportunity Revenue Forecast. For example:

```
FILTER ("Forecast Metrics"."Forecast Revenue" USING ("Forecast Date.Date = date '2009-09-16'
AND Forecast."Forecast Type" = 'Opportunity Revenue Forecast'))
```

Using the FILTER metric function is not the same as adding a filter to the report. If you add a report filter to the filter by Forecast Date and Forecast Type, you do not get any values for the user quota or real-time revenue. If you have multiple quotas defined for each user, you must use the FILTER metric function to reference the specific quota value. For example:

```
FILTER("Quota Metric"."Quota Value" USING (Quota."Quota Name" = 'Sales')
```

In this example, the FILTER metric function obtains the quota value for a specific quota name (Sales). Without this filter metric, you get only the total value of all the quotas.

The Account and Contact dimensions include a Book hierarchy, which enables you to analyse metrics and related attributes at any level. The Book dimension enables you to analyse metrics and related attributes of accounts and contacts at any level of the book hierarchy.

Households Reporting Subject Area

Availability

This subject area is available only in the Oracle CRM On Demand Financial Services Edition.

Business Purpose

The Households Reporting subject area provides the ability to generate reports on households for the Contact dimension. This subject area enables advisors and their managers to answer questions, such as the following:

- Which of my clients belong to which households?

- How are the household assets in my book of business divided among my clients?

- What are my top households by total asset value?

The Households Reporting subject area also has a Portfolio dimension that can be used to report on information of associated portfolios of household contacts. The Portfolio dimension has an indirect relationship with Households (through Contacts) and so the Portfolio dimension attributes cannot be used directly to analyse the household metrics. You can combine household reports with portfolio reports to provide an enhanced client service by understanding clients as members of a household.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Contact
- Household
- Household Contact
- Portfolio

Metrics

The complete list of metrics for this subject area is as follows:

- Household Metrics
  - Total Household Assets
    - Total Household Assets
    - Total Household Assets (000)
    - Average (Avg) Total Household Assets
    - Average (Avg) Total Household Assets (000)
  - Total Household Expenses
    - Total Household Expenses
    - Total Household Expenses (000)
    - Average (Avg) Total Household Expenses
    - Average (Avg) Total Household Expenses (000)
  - Total Household Income
    - Total Household Income
    - Total Household Income (000)
    - Average (Avg) Total Household Income
    - Average (Avg) Total Household Income (000)
  - Total Household Liabilities
    - Total Household Liabilities
    - Total Household Liabilities (000)
    - Average (Avg) Total Household Liabilities
    - Average (Avg) Total Household Liabilities (000)
  - Total Household Net Worth
    - Total Household Net Worth
    - Total Household Net Worth (000)

- Average (Avg) Total Household Net Worth

- Average (Avg) Total Household Net Worth (000)

- Total Contact Assets

  - Total Assets

  - Total Assets (000)

  - Average (Avg) Total Assets

  - Average (Avg) Total Assets (000)

- Total Contact Expenses

  - Total Expenses

  - Total Expenses (000)

  - Average (Avg) Total Expenses

  - Average (Avg) Total Expenses (000)

- Total Contact Income

  - Total Income

  - Total Income (000)

  - Average (Avg) Total Income

  - Average (Avg) Total Income (000)

- Total Contact Liabilities

  - Total Liabilities

  - Total Liabilities (000)

  - Average (Avg) Total Liabilities

  - Average (Avg) Total Liabilities (000)

- Total Contact Net Worth

  - Total Net Worth

  - Total Net Worth (000)

  - Average (Avg) Total Net Worth

  - Average (Avg) Total Net Worth (000)

- Household Custom Metrics

  - Indexed Number

  - Average (Avg) Indexed Number

  - Indexed Currency

  - Average (Avg) Indexed Currency

- Number (#) of Rolled Up Contacts

- Number (#) of Rolled Up Service Requests

- Number (#) of Rolled Up Leads

- Number (#) of Contacts

- Number (#) of Contact Service Requests

- Number (#) of Contact Leads

- Number (#) of Households

Usage Notes

The Contact dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

The Portfolio dimension normally includes non-financial assets such as vehicles unless your administrator has specifically excluded such non-financial assets in Portfolio lists using the Exclude Vehicle / Asset Records from Portfolio Accounts option in the Company Profile page.

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type

Record Type	Oracle CRM On Demand Answers Coverage
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Contact dimension has a Contact Type field. There is also a Contact Type Code field, which is the optimised version of the Contact Type field. Similarly, there is a Created Date UTC field, which is the optimised version of the Created Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For more information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimension in this subject area has optimised filtering fields:

- Contact

Leads Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyse lead metrics by account, account territory, campaign, contact, date, lead, opportunity, owned by user, and principal partner account. This subject area contains metrics to analyse lead quality, lead conversion, and revenues associated with leads.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

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Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Account
- Account Territory
- Campaign
- Contact
- Date
- Lead
- Opportunity
- Owned By User
- Principal Partner Account

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field.

For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account

- Campaign

- Contact

- Lead

- Opportunity

Metrics

The complete list of metrics for this subject area is as follows:

- Lead Metrics

    - Account Territory Hierarchy

        - Top Level Territory Name

        - Level 8 Territory Name

        - Level 7 Territory Name

        - Level 6 Territory Name

        - Level 5 Territory Name

        - Level 4 Territory Name

        - Level 3 Territory Name

        - Level 2 Territory Name

        - Level 1 Territory Name

    - Number (#) of Leads

    - Number (#) of Qualified Leads

    - Number (#) of Rejected Leads

    - Number (#) of Archived Leads

    - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)

    - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)

    - Number (#) of Leads Resulting in Lost Opportunity

    - Number (#) of New Opportunities

    - Number (#) of Wins

    - Closed Revenue for Lead

    - Expected Revenue for Lead

■   Opportunity Revenue for Lead

Usage Notes

The Account and Contact dimensions include a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Opportunities Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyse opportunities by account, territory, campaign, contact, territory, owner, and date dimensions. This subject area is a multi-fact subject area that includes opportunity and quota metrics. Opportunity metrics are defined at the most granular level in this subject area, and hence, can be analysed by every possible dimension. However, Quota metrics are at less granular level and can be analysed only by limited dimensions including Date (Month), Quota, Owner.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

- Account
- Account Territory
- Campaign
- Close Date
- Date Opened
- Opportunity
- Owned By User
- Primary Contact
- Principal Partner Account
- Quota
- Territory

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimised version of the Last Call Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account
- Campaign
- Contact

■ Opportunity

Metrics

The following are the key metrics in this subject area:

■ Revenue (Expected and Closed)

■ Number (#) of Opportunities (Open and Closed)

■ Number (#) of Wins

■ Quota amounts

The complete list of metrics for this subject area is as follows:

■ Opportunity Metrics

    ■ Opportunity Custom Metrics

        ■ Indexed Currency

        ■ Average (Avg) Indexed Currency

        ■ Indexed Number

        ■ Average (Avg) Indexed Number

    ■ Revenue

    ■ Expected Revenue

    ■ Closed Revenue

    ■ Revenue (000)

    ■ Expected Revenue (000)

    ■ Closed Revenue (000)

    ■ Number (#) of Opportunities

    ■ Number (#) of Open Opportunities

    ■ Number (#) of Closed Opportunities

    ■ Number (#) of Wins

    ■ Average Number (Avg #) of Days in Stage

■ Quota Metrics

    ■ Quota Value

Usage Notes

Because quota metrics are not defined at the Opportunity dimension level, these metrics are displayed as empty cells when Opportunity dimension attributes are on the report.

The Account dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

The Opportunities Reporting subject area and the Opportunity Historical Analytic subject area provide different metrics. Before selecting one of these subject areas, review the provided metrics in both to make sure you use the subject area that best suits your needs,

Opportunities and Competitors Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyse the many-to-many relationship between opportunities and competitor accounts. This subject area is almost identical to the opportunity subject areas. The only difference is that it includes the competitor account dimension, which has a many-to-many relationship with the opportunity record type. This subject area allows you to create reports to show all the competitors for an opportunity. Because this subject area represents the many-to-many relationship between opportunities and competitor accounts, the opportunities that do not have an association with at least one competitor account cannot be reported using this subject area. The attributes that define the competitor account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Account
- Account Territory
- Campaign
- Close Date
- Date Closed
- Opportunity
- Opportunity Competitor
- Owned By User
- Primary Contact
- Relationship Contact
- Territory

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimised version of the Last Call Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account

- Campaign

- Contact

- Opportunity

Metrics

The complete list of metrics for this subject area is as follows:

- Opportunity Metrics

    - Opportunity Custom Metrics

        - Indexed Currency

        - Average (Avg) Indexed Currency

        - Indexed Number

        - Average (Avg) Indexed Number

    - Revenue

    - Expected Revenue

    - Closed Revenue

    - Revenue (000)

    - Expected Revenue (000)

    - Closed Revenue (000)

    - Number (#) of Opportunities

    - Number (#) of Open Opportunities

    - Number (#) of Closed Opportunities

    - Number (#) of Wins

    - Average Number (Avg #) of Days in Stage

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Opportunities and Partners Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyse the many-to-many relationship between opportunities and partner accounts. It is almost identical to the opportunity subject areas. The only difference is that it includes the partner account dimension, which has a many-to-many relationship with the opportunity record type. This subject area allows you to create reports that show all the partners for an opportunity. Because this subject area represents the many-to-many relationship between opportunities and partner accounts, the opportunities that do not have an association with at least one partner account cannot be reported using this subject area. The attributes that define the partner account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Account
- Account Territory
- Campaign
- Close Date
- Date Opened
- Opportunity
- Opportunity Partner
- Owned By User
- Primary Contact
- Relationship Contact
- Territory

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type

field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimised version of the Last Call Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account

- Campaign

- Contact

- Opportunity

Metrics

The complete list of metrics for this subject area is as follows:

- Opportunity Metrics
  - Opportunity Custom Metrics
    - Indexed Currency
    - Average (Avg) Indexed Currency
    - Indexed Number
    - Average (Avg) Indexed Number
  - Revenue
  - Expected Revenue
  - Closed Revenue
  - Revenue (000)
  - Expected Revenue (000)
  - Closed Revenue (000)
  - Number (#) of Opportunities
  - Number (#) of Open Opportunities
  - Number (#) of Closed Opportunities
  - Number (#) of Wins
  - Average Number (Avg #) of Days in Stage

Usage Notes

The Account and Contact dimensions include a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Opportunity Contacts Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

You can use this subject area to report on all contacts associated with an opportunity or a contact that is associated with multiple opportunities. In other opportunity subject areas, you can report only on an opportunity's primary contact. This subject area has no metrics.

Relationship Type

Many-to-Many

Dimensions

This subject area offers the following dimensions:

- Contact
- Opportunity

Metrics

None.

Usage Notes

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Contact
- Opportunity

Opportunity Product Revenues Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand

Business Purpose

This subject area allows you to analyse opportunity product revenues by account, account territory, campaign, opportunity, opportunity product, owned by user, product, and product category. Because each recurring product revenue record might have a different start date, the level of detail for this subject area is at the lowest level and contains one row for each recurring product revenue record within the opportunity. Given the level of detail for this subject area, it provides the utmost flexibility to roll up data at any level of the supported dimensions. This subject area also contains the quota dimension and metrics, which allow you to report both opportunity product revenue and quota metrics in the same report.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Account
- Account Territory
- Campaign
- Opportunity
- Opportunity Product Revenue
- Owned By User
- Primary Contact
- Product
- Product Category
- Quota

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account
- Campaign
- Opportunity

Metrics

The complete list of metrics for this subject area is as follows:

- Opportunity Product Revenue Metrics

- Number (#) of Products
- Average (Avg) Number (#) of Products
- Quota Metrics
  - Quota Value

Usage Notes

The Account and Primary Contact dimensions include a Book hierarchy, which enables you to analyse metrics and related attributes at any level.

Reports made with this subject area include a summary revenue record row for each revenue record displayed in the report. If you do not want the summary revenue record rows included in the report, then either add the Product Name field to the report or use the Opportunity History Analytic subject area (on page 1013).

Opportunity Team Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the relationship between opportunities and opportunity teams. Use this subject area to query for team members involved in an opportunity. This subject area has no metrics.

Relationship Type

Many-to-Many.

Dimensions

This subject area offers the following dimensions:

- Account
- Opportunity
- Opportunity Team
- Owned By User

Metrics

None.

Usage Notes

Data Visibility. This subject area always uses the Team Visibility mode, regardless of which settings you defined in your profile. For that reason, you can always report on all the opportunities where you are either the owner or a team member.

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Orders Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

Use this subject area to analyse orders by account, contact, date, opportunity, owner and product dimensions.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Contact
- Date
- Opportunity
- Order
- Owned By User
- Product

Metrics

The complete list of metrics for this subject area is as follows:

- Number (#) of Orders
- Order Items Quantity

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account
- Contact
- Opportunity
- Order
- Owned By User
- Product

Usage Notes

This subject area has multiple dimensions, but you must take care not to mix dimensions indiscriminately. Not all combinations of dimensions and metrics yield useful results.

- The metric 'Number (#) of Orders' applies only to the Order dimension which can be rolled up by direct relationship (Account, Contact, Date, Opportunity and Owner dimensions) but not by the Product dimension, because there is no direct relationship between the Product and Order dimensions.

- The Product dimension is only associated with Order Item, you can still report Product with Order details through the Order dimension.

Partners Reporting Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Partner Relationship Management Edition.

Business Purpose

The Partners Reporting subject area provides the ability to analyse partners and measure important performance metrics, including the number of qualified leads and total revenue in the opportunity pipeline.

Relationship Type

Summary

Dimensions

This subject area has the following dimensions:

- Date Created
- Owned By User
- Partner
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Partner Metrics
- Partner Custom Metrics
    - Average (Avg) Indexed Currency
    - Average (Avg) Indexed Number
    - Indexed Currency
    - Indexed Number
  - Number (#) of Partners
  - Number (#) of Archived Leads
  - Number (#) of Cancelled Service Requests (SRs)
  - Number (#) of Closed Opportunities

- Number (#) of Closed SRs
- Number (#) of Leads
- Number (#) of Leads Converted to Opportunities
- Number (#) of Leads Resulting in Lost Opportunity
- Number (#) of Leads Resulting in Won Opportunity
- Number (#) of Open Opportunities
- Number (#) of Open SRs
- Number (#) of Opportunities
- Number (#) of Pending SRs
- Number (#) of Qualified Leads
- Number (#) of Rejected Leads
- Number (#) of SRs
- Number (#) of Wins
- Average Number (Avg #) of Days in Stage
- Average (Avg) Days to Close SR
- Average (Avg) Open SR Age
- Closed Revenue
- Closed Revenue (000)
- Closed Revenue for Lead
- Expected Revenue for Lead
- Opportunity Revenue for Lead
- Revenue
- Revenue (000)

Usage Notes

The previous metrics are based on the Principal Partner Account of Leads, Opportunities, and Service Requests.

Personalised Content Delivery Reporting Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Life Sciences Edition.

Business Purpose

This subject area provides the information required by various roles in a pharmaceutical organisation to better understand physicians, refine content, and deliver the right message to the right person at the right time. For example, a marketing manager can analyse detailing trends, collateral performance, and responses from various segments. With this information, the manager can revise collateral or segment the customer base again, and then target customers accordingly. A sales manager can analyse the detailing trends, looking for good and bad performers in a territory, and so coach the team, as needed.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

■ Account

■ Activity

■ Contact

■ Message Response

■ Messaging Plan

■ Messaging Plan Item

■ Product

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

■ Account

■ Activity

■ Contact

Metrics

The complete list of metrics for this subject area is as follows:

■ Account Metrics

    ■ Number (#) of Accounts

■ Activity Metrics

    ■ Number (#) of Accounts with Activities

    ■ Number (#) of Activities

    ■ Number (#) of Closed Activities

    ■ Number (#) of Open Activities

■ Contact Metrics

    ■ Contact Custom Metrics

        ■ Average (Avg) Indexed Currency

        ■ Average (Avg) Indexed Number

- Indexed Currency
- Indexed Number
- Number (#) of Contacts

- Message Response Metrics
  - Messaging Response Custom Metrics
    - Average (Avg) Indexed Currency
    - Indexed Currency
    - Average (Avg) Indexed Number
    - Indexed Number
  - Number (#) of Messaging Responses
  - Average (Avg) Sequence Number
- Messaging Plan Item Metrics
  - Messaging Plan Item Custom Metrics
    - Average (Avg) Indexed Currency
    - Indexed Currency
    - Average (Avg) Indexed Number
    - Indexed Number
  - Number (#) of Messaging Plan Items
  - Average (Avg) Sequence Number
- Messaging Plan Metrics
  - Messaging Plan Custom Metrics
    - Average (Avg) Indexed Currency
    - Indexed Currency
    - Average (Avg) Indexed Number
    - Indexed Number
  - Number (#) of Messaging Plans

Usage Notes

The Activity dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Quotes Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand. The Quotes object must be provisioned by an administrator.

Business Purpose

Use this subject area to analyse quotes by account, date and owner dimensions.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Date
- Opportunity
- Owned By User
- Quote

Metrics

The complete list of metrics for this subject area is as follows:

- Quote Custom Metrics
- Number (#) of Quotes

Usage Notes

None.

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account
- Opportunity
- Owned By User
- Quote

Service Requests Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides the ability to analyse service requests by account, contact, service request, user, partner, and date dimensions. It helps you to measure and analyse important performance metrics of the customer service request organisation, including how long service requests have been open and the average duration to close them. Using these performance metrics for service requests can help your company to improve customer satisfaction, employee productivity, and reduce operational costs.

Relationship Type

Simple

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type

Record Type	Oracle CRM On Demand Answers Coverage
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Account

- Contact

- Date Closed

- Date Opened

- Opportunity

- Owned By User

- Principal Partner Account (available only in Oracle CRM On Demand Partner Relationship Management Edition)

- Service Request

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimised version of the Last Call Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account

- Contact

- Service Request

Metrics

The complete list of metrics for this subject area is as follows:

- Service Request Metrics

  - Service Request Custom Metrics

    - Indexed Currency

    - Average (Avg) Indexed Currency

- - Indexed Number

  - Average (Avg) Indexed Number

- Number (#) of Service Requests (SRs)

- Number (#) of Open SRs

- Number (#) of Closed SRs

- Number (#) of Pending SRs

- Number (#) of Cancelled SRs

- Average (Avg) Open SR Age

- Average (Avg) Days to Close SR

Usage Notes

- The Account, Contact, and Service Request dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

- Use the Opportunity dimension to analyse metrics and attributes in the opportunity to service request relationship.

Shared Activities Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides the ability to analyse shared activities by account, contact, and user dimensions. Because these activities can be shared by one or more users in Oracle CRM On Demand, using this subject area you can report shared activities. Activities that are not shared with at least one user cannot be reported using this subject area.

Relationship Type

Many-to-many

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the

optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Contact
- Owned By User

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimised version of the Indexed Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account
- Activity
- Contact

Metrics

None

Usage Notes

The Account, Activity, and   Contact dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

The data visibility to the activity record is not controlled through the book association with that activity record in this subject area. You must own the activity record, or it must be shared with you so that you can see activity records in this subject area.

Solutions Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

In this subject area, you can analyse solutions by product, product category, service request, and expiration date dimensions, as well as   the relationship between solutions and their associated service requests. You can also analyse important solution and related service requests metrics that help your company to evaluate the status and effectiveness of solutions.

Relationship Type

Many-to-Many

Dimensions

This subject area has the following dimensions:

- Expiration Date
- Product
- Product Category
- Service Request

■ Solution

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Metrics

The complete list of metrics for this subject area is as follows:

■ Solution Custom Metrics

    ■ Average (Avg) Indexed Currency

    ■ Average (Avg) Indexed Number

    ■ Indexed Currency

    ■ Indexed Number

■ Number (#) of Solutions

- Number (#) of Approved Solutions

- Number (#) of Published Solutions

- Number (#) of Obsolete Solutions

- Number (#) of SRs

- Number (#) of Open SRs

- Number (#) of Closed SRs

Usage Notes

The Product Category dimension is an independent dimension, not driven through product as are other subject areas. This is specifically done to match the special behaviour of the Solutions user interface where a product category can be assigned to a solution without a product value.

The Service Request dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Special Pricing Products Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

Special pricing requests allow partners and brand owners to execute a set of business processes, by which a partner asks the brand owner for a lower price on a product (for various reasons, such as a response to a competitive deal or general downward price trends).

This subject area provides you with the ability to perform real-time analysis and report on special pricing requests and special pricing products, so you can assess partner performance. You can use metrics and information, such as authorised price reductions for each product, partner, and quarter to measure discount effectiveness and product performance in the channel.

Relationship Type

Simple

Dimensions

This subject area offers the following dimensions:

- Date

- Deal Registration

- End Customer (Account)

- Last Approved by (User)

- Opportunity

- Owned By User

- Principal Partner Account

- Product

- Product Category

- Special Pricing Request

Metrics

The complete list of metrics for this subject area is as follows:

- Special Pricing Product Metrics

  - Number of (#) of Special Pricing Requests

  - Amount Authorised

  - Amount Authorised (000)

  - Amount Requested

  - Amount Requested (000)

  - Average (Avg) Amount Authorised

  - Average (Avg) Amount Requested

  - Average (Avg) Authorised Cost

  - Average (Avg) Authorised Discount Percent

  - Average (Avg) MSRP

  - Average (Avg) Purchase Cost

  - Average (Avg) Quantity

  - Average (Avg) Requested Cost

  - Average (Avg) Requested Discount Percent

  - Average (Avg) Requested Resale Price

  - Average (Avg) Suggested Resale Price

  - Quantity

Usage Notes

The End Customer dimension is the Account dimension. The Last Approved by dimension is the User dimension.

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Vehicles Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides the ability to analyse vehicle-related metrics by vehicle and dealer dimensions and other associated dimension objects, such as account, contact, date, dealer, and product.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

■ Account

■ Contact

■ Date

■ Dealer

■ Product

■ Vehicle

Metrics

The complete list of metrics for this subject area is as follows:

■ Vehicle Metrics

　　■ Vehicle Custom Metrics

　　■ Number (#) of Vehicles

Usage Notes

Optimised Custom Fields

This subject area has custom fields that are optimised to reduce the query time when they are used in filters. Optimised custom fields are in folders where the name ends with *Optimised Custom Fields* or *Optimised Custom Metrics*, such as *Account Optimised Custom Fields* and *Opportunity Optimised Custom Metrics*. Numeric custom fields, such as those with a type of CUR, INT or NUM, are available as metrics in the optimised custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

The following record types have optimised custom fields and metrics coverage in Oracle CRM On Demand Answers and one or more of these record types might be present as dimensions or facts in this subject area:

Record Type	Oracle CRM On Demand Answers Coverage
Account	All optimised fields
Activity	All optimised fields
Assessment	All optimised fields
Campaign	All optimised fields

Record Type	Oracle CRM On Demand Answers Coverage
Contact	All optimised fields
Custom Objects 1-40	All optimised fields in CO1, CO2, CO3, CO4, CO5, and CO9 only
Lead	All optimised fields
Opportunity	All optimised fields
Opportunity Team	First five optimised fields of each type
Product	All optimised fields
Revenue	All optimised fields
Service Request	All optimised fields

Optimised Filtering Fields

This subject area has fields that are optimised for reducing the query time when they are used in filters. Optimised fields end with the words Code or UTC. For example, the Contact dimension has an Assignment Filter 1 field. There is also an Assignment Filter 1 Code field, which is the optimised version of the Assignment Filter 1 field. Similarly, there is a Created Date UTC field, which is the optimised version of the Created Date field. Using the optimised field in the filter generates faster queries. This method is faster than using the standard field. For more information on using optimised filtering fields, see Using Optimised Filtering Fields (on page 1161). The following dimensions in this subject area have optimised filtering fields:

- Account
- Contact
- Date
- Dealer
- Vehicle

Changing the Appearance of Reports

When setting up or updating reports in Oracle CRM On Demand Answers, you can change the visual appearance of reports, known as cosmetic formatting. You can apply cosmetic formatting, copy and paste cosmetic formatting attributes and save a formatted report to use as a style template.

Depending on the item you are formatting, the dialog box displays different options, such as font, cell, and border controls, background colour, additional formatting options such as cell padding, and custom CSS style options for HTML.

You can change the appearance of:

- Columns and sections, such as background colour and borders
- Columns in tables

■ Size of titles

You can copy the range of cosmetic formatting attributes that you apply to an item, such as a column in a table, and paste them to an item of the same type, such as another column in the table or a column in a different table. You can also restore the default appearance. To do this, use the icons at the top right of the dialog boxes.

Views that support copying and pasting include the table, pivot table and chart views.

About Saving Reports as Style Templates

After you have customised and saved the cosmetic appearance of a report, you can use it as a template. This allows you to apply the formatting from the saved report to new or existing reports.

Views that support the use of a saved report as a template include the table, pivot table and chart views.

This topic contains information about performing the following tasks:

■ Formatting the visual appearance of a report

■ Copying and pasting a formatting attribute

■ Restoring the default appearance of an attribute

■ Using a saved report as a template

To format the visual appearance of a report

1 In Oracle CRM On Demand, click the Reports tab.

2 On the Reports Homepage, in the Custom Reports and Analyses section, click Design Analyses to open Oracle CRM On Demand Answers.

3 In Oracle CRM On Demand Answers, click Open Analysis.

4 Select the report that you want to work with, then click OK.

5 In the Build and View Analyses page, open the cosmetic format dialog box by doing one of the following:

■ In Step 1, click the Column Properties button, and then click the Style tab in the Column Properties dialog box.

■ In Step 2, open the Edit Format dialog box by doing one of the following:

■ For Title or Table, click the Format View button.

■ In the pivot table view, click the Pivot Table View Properties button and then the Set alternate format button.

NOTE: In the table view, you can also click the format column button and use the Value Format tab. In the pivot table view, you can also click the section properties button and use the Section Properties tab.

The cosmetic format dialog box appears.

6 In the Font area, make your selections for the font family, size, colour, style (such as bold), and any effects that you want to apply (such as underlining).

> **NOTE:** For some items, this option is not available.

7 In the Cell area, set up the alignment and background colour.

> **NOTE:** For horizontal alignment, the most common justification for text data is left. For numeric data, the most common justification is right.

> Vertical alignment does not have any impact unless the column spans multiple rows of other columns.

8 In the Border area, make your selections for the border position, colour, and style of the cell.

> **TIP:** You can select or deselect custom borders by clicking the top, bottom, left, and right borders near the Position drop-down list.

9 To format spacing within the cell, click Additional Formatting Options and specify values for the width and height of the cell contents, and the space above, below, left and right of the contents.

> Values are specified in pixels.

10 To override the style and class elements specified in Oracle CRM On Demand Answers style sheets, make your selections in the Custom CSS Style Options area:

> **a** Click the settings that you want to use.

> **b** Provide the location of the class, style, or style sheet.

> **NOTE:** The advanced style formatting options are for users who know how to work with cascading style sheets.

11 Click OK.

To copy and paste a formatting attribute

1 In the Build and View Analysis page, go to the item whose formatting you want to copy, such as a row, column, or table cell.

2 Open the Cosmetic Formatting dialog box, click the Copy Formatting button, then click Cancel to close the Cosmetic Formatting dialog box.

3 Go to the item to which you want to paste the formatting.

4 Open the cosmetic formatting dialog box, click the paste formatting button, then click OK to apply your changes.

To restore the default appearance

■ Open the Cosmetic Formatting dialog box for the item, and then click the Clear Formatting button.

For some types of views, when you add the view, you can use a saved report as a template, as described in the following procedure.

To use a saved report as a template

1   In the Build and View Analysis page, go to Step 2 Create Layout.

2   Click Add View, and select the view that you want.

3   Click the Import View Formatting From Another Analysis button, which is near the top of the workspace:

   Note: You can import formatting from reports that have formats from Step 2 (Creating Layouts). Formatting from Step 1 (Defining Criteria) cannot be imported.

4   In the Import Saved Format dialog box, navigate to the saved report, and click OK.

5   Click either the Saved Results link or the Preview Analyses button.

Using Optimised Filtering Fields

Optimised fields end with the words *Code* (for picklists) or *UTC (*Coordinated Universal Time) for date-time fields. Using the optimised field in the filter improves report performance.

Code Fields in Filters

Code fields store picklist values in language independent code (LIC) for multi-language picklists. In Oracle CRM On Demand, you manage multiple languages by using language independent codes and individual entries for each language. For example, a status field might be implemented as follows for the language value with a status of Active.

Language	Value	Language Independent Code
English	Active	Active
French	Actif	Active
German	Aktiv	Active
Spanish	Activo	Active

To filter active accounts, you create a filter for the Status Code field (the optimised version of the Status field) and for the LIC value (in this case, Active). No matter which language you use, querying for the LIC value improves report performance because an extra translation step is not required to query other languages.

Displaying the LIC Values for a Picklist

To display the LIC values for a picklist, use the following procedure.

To display the LIC values for a picklist

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

2 In the Application Customisation section, click the Application Customisation link.

3 In the Record Types Set-up section, click the link for the required record type.

4 In the Field Management section, click *record type* Field Set-up.

5 On the Fields page, click one of the Edit Picklist links for the picklist field that you want.

   The LIC values are in the Id column.

UTC Fields in Filters

When you use UTC fields, they are not converted to company or user time zones and so they improve report performance. Performance is further improved when the date-time fields are indexed in the database. You can suppress these fields in your reports and use the fields that have adjusted time zones instead.

About Hierarchies

Some data objects, such as account, book, opportunity, and territory, support a hierarchical (tree) structure. For example, the territory hierarchy appears in multiple subject areas and is usually used to store sales territory information. Oracle CRM On Demand supports 10 levels of hierarchy. For example, a territory hierarchy implemented for a company in the United States might have this kind of structure:

- Top Level is set to USA.

- Level 8 has the following entries: Northeast, South, Midwest, and West.

- Level 7 has subentries, for example, the Northeast territory has: Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, and Connecticut.

- Level 6 has more subentries. For example, the Massachusetts entry has: Boston, Cape Cod, Eastern Massachusetts, and Western Massachusetts.

- Level 5 divides the previous territories further. For example, the Cape Cod territory has: Lower Cape, Outer Cape, Hyannis, and Barnstable.

- Level 4 is not used in this example.

- Level 3 is not used in this example.

- Level 2 is not used in this example.

- Level 1 is not used in this example.

In Oracle CRM On Demand Answers, the previous hierarchy is more compressed, as shown in the following table. The maximum number of hierarchy levels that is supported is 10. So, if a hierarchy has less than ten levels, then the lowest-level values are repeated for those levels (Hyannis for Level 5 through Level 1). This feature enables you to report your related metrics at any level of the hierarchy.

Top Level Territory Name	USA
Level 8 Territory Name	Northeast
Level 7 Territory Name	Massachusetts
Level 6 Territory Name	Cape Cod
Level 5 Territory Name	Hyannis
Level 4 Territory Name	Hyannis
Level 3 Territory Name	Hyannis
Level 2 Territory Name	Hyannis
Level 1 Territory Name	Hyannis

In the Oracle CRM On Demand Answers user interface, the hierarchy attributes are in a subfolder under the main dimension folder, such as account, territory, and so on. All entries are displayed in alphabetical order.

Step 1: Defining Criteria

You define the criteria for your reports in the Define Criteria page in Oracle CRM On Demand Answers. To access the Define Criteria page, either create a new analysis, as described in Getting Started with Answers (Custom Reports) (on page 933), or open an existing analysis in Oracle CRM On Demand Answers.

Click a topic to see step-by-step instructions to do the following:

- Adding Columns to Reports (on page 1164)
- Adding Custom Fields to Reports (on page 1164)
- Adding Filters to Columns (on page 1164) (optional but recommended)
- Editing Column Properties (on page 1173)
- Setting Up Column Formulas (on page 1184)
- Adding Action Links to Results (on page 1185) (optional)
- Sorting and Reordering Columns (on page 1189)

Related Topics

See the following topics for related information:

- About Using Addresses in Reports (on page 1189)
- Combining Results from Multiple Reports Using Set Operations (on page 1190)

Adding Columns to Reports

When creating or modifying reports in Oracle CRM On Demand Answers, you add columns until your report contains all the data that you want.

NOTE: The periods in your reports might be based on your company's fiscal calendar, which might be different from a standard calendar. For example, your company's fiscal year might begin on 1 June of each calendar year. If your company has recently changed its fiscal calendar year in Oracle CRM On Demand, then you must review historical analyses carefully if they span multiple years. Data in reports that is based on your previous fiscal calendar cannot be aligned with data using a new fiscal calendar.

To add columns to your report

1   In Oracle CRM On Demand Answers, in the Active Subject Area section, expand the Column lists to display the columns that you can include in the reports.

2   Click the columns that you want to include in the report.

   NOTE: You can remove a column from the report by clicking the X icon within that column. You can change the order of columns by dragging them to the new location and dropping them.

Adding Custom Fields to Reports

You can add custom fields as columns in reports and analyses in Oracle CRM On Demand Answers. For more information about adding columns to reports, see Adding Columns to Reports (on page 1164).

For multilanguage deployments using Oracle CRM On Demand Answers, you must translate custom fields into each language that is used with Oracle CRM On Demand Answers, so that those fields are available to be added to reports and analyses. For example, if a custom field is created in English, it must be translated in to German, so that a German user can see, and then use the custom field in a report or an analysis.

Adding Filters to Columns

In Oracle CRM On Demand Answers, in the Define Criteria page, you can set up filters for columns in your report. A filter limits the results that appear when a report is run. Oracle CRM On Demand Answers shows only those results that match the criteria.

A column filter consists of the following elements:

■   A column to filter, such as Account Type.

■   A value to be used when applying the filter, such as 10 (a SQL expression or a variable can be used instead of a value when necessary).

■   An operator that determines how the value is applied, such as Less Than.

For example, if the column contains the quantity sold, the operator is Less Than, and the value is 10, the results only include order quantities where less than 10 units were sold.

A column filter can also have the following characteristics:

■ It can be combined with other column filters from the same subject area to further restrict the results of a report.

■ Filters can be grouped to create complex filters.

■ Its value can be restricted by the results of a previously saved report from the same subject area.

■ A column filter applies only to the column in which it is built. It does not affect other columns.

The filter is translated into a WHERE clause in the SQL SELECT statement. The WHERE clause is used to limit the rows returned to those that fit the specified constraints. Advanced users can enter the SQL for a filter directly.

NOTE: If you selected the option to add new picklist values when importing data, these new picklist values may not show up in the reports for 24 hours. Therefore, you may not be able to use the new picklist values as filters during this time period.

Creating Column Filters

You can create a filter on any column in your reports. If you do not want the column to display in results, you can hide it.

CAUTION: If you click your browser's Refresh button before you have finished creating a column filter, the browser reloads the page and discards your changes.

To create a filter without adding the column to the report

■ Control-click the column.

To create a column filter

1 In Oracle CRM On Demand Answers, in the Define Criteria page, click the New Filter button in the column where you want to create the filter.

2 In the Create/Edit Filter dialog box, select an operator from the Operator drop-down list.

The choices for operators and values appear in the left column. Depending on the type of column you select, additional options may appear in the right column, such as calendar buttons for specifying a date range, or a text-matching box for limiting long lists of values.

3 To specify a value, enter it in the Value box, or click All Choices to view the available values in the column, and select a value from the list.

Multiple values can be added by clicking Add and selecting Value after entering data for the current value field.

NOTE: To use All Choices/Limited Choices on a Control-Click filter, you need to select at least one column in the Analysis. The selected column does not need to be the one to which you are adding the filter.

Use the guidelines shown in the following table when choosing an operator and specifying values. For more information on operators, see *Usage Notes on Operators*, which appears after this procedure.

Operator	Usage Guidelines
is equal to or is in	Valid for a column that contains text, numbers or dates. Specify a single value or multiple values. Results will only include records in which the data in the column matches the value in the filter.
is not equal to or is not in	Valid for a column that contains text, numbers or dates. Specify a single value or multiple values. Results will only include records in which the data in the column does not match the value in the filter.
is less than	Valid for a column that contains numbers or dates. Specify a single value. Results will only include records in which the data in the column is less than the value in the filter.
is greater than	Valid for a column that contains numbers or dates. Specify a single value. Results will only include records in which the data in the column is greater than the value in the filter.
is less than or equal to	Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results will only include records in which the data in the column is less than or equal to the value in the filter.
is greater than or equal to	Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results will only include records in which the data in the column is greater than or equal to the value in the filter.
is between	Valid for a column that contains numbers or dates. Specify two values. Results will include records for both the specified values and the values in between them.
is null	Valid for a column that contains text, numbers or dates. Do not specify a value. The operator only tests for the absence of data in the column. The results include only records where there is no data in the column. Sometimes it might be useful to know whether any data is present, and using the IS NULL operator is a way to test for that condition.
is not null	Valid for a column that contains text, numbers or dates. Do not specify a value. The operator only tests for the presence of data in the column. Results will only include records in which there is data in the column.
is in top	Valid for a column that contains text, numbers or dates. Specify a single value. Results will only include the first n records, where n is a whole number specified as the value in the filter. This operator is for ranked results. For example, you could use this operator to obtain a list of the top 10 performers.

Operator	Usage Guidelines
is in bottom	Valid for a column that contains text, numbers or dates. Specify a single value. Results will only include the last n records, where n is a whole number specified as the value in the filter. This operator is for ranked results. For example, you could use this to obtain a list of the customers reporting the least numbers of problems.
contains all	Valid for a column that contains text, numbers or dates. Specify a single value or multiple values. Results will only include records in which the data in the column contains all of the values in the filter.
contains any	Valid for a column that contains text, numbers or dates. Specify a single value or multiple values. Results will only include records in which the data in the column contains at least one of the values in the filter.
does not contain	Valid for a column that contains text, numbers or dates. Specify a single value or multiple values. Results will only include records in which the data in the column does not contain any of the values in the filter.
begins with	Valid for a column that contains text, numbers or dates. Specify a single value. Results will only include records in which the data in the column begins with the value in the filter.
ends with	Valid for a column that contains text, numbers or dates. Specify a single value. Results will only include records in which the data in the column ends with the value in the filter.
is LIKE (pattern match)	Valid for a column that contains text. Specify a single value or multiple values. Requires the use of a percentage symbol (%) as a wildcard character. You may specify up to two percentage sign characters in the value. Results will only include records in which the data in the column matches the pattern value in the filter.
is not LIKE (pattern match)	Valid for a column that contains text. Specify a single value or multiple values. Requires the use of a percentage symbol (%) as a wildcard character. You may specify up to two percentage sign characters in the value. Results will only include records in which the data in the column does not match the pattern value in the filter.
is prompted	Valid for a column that contains text, numbers or dates. Setting a column to *is prompted* flags it to be filtered by a value passed to it from another report. **NOTE:** Use this option when linking reports together through navigation (see Step 2: Creating Layouts (on page 1191)). One or more columns in the report you drill into must contain the *is prompted* filter for that report to display rows limited to the value selected and drilled into from the parent report.

4 Use the paging controls to navigate through the choices when there are several choices for the column:

■ Click on a specific page number to navigate to that page.

■ Click the double right-arrow paging button (>>) to advance to the last page or the double left-arrow paging button (<<) to go back to the first page.

5 Use the calendar buttons to specify the date range for columns that contain dates.

To specify a single date, specify the same date for the start and end date.

6 Use the Match drop-down list to view the available values to use in a filter. If desired, specify criteria for restricting the values to be returned (this is not mandatory). Then click the All Choices link, and select a value from the list returned.

For example, suppose you want to see results for the Northern region. If you enter an E into the text box and select "begins with" from the Match drop-down list, the list only shows the values that begin with an E.

7 To add an SQL expression or a session variable, perform the following:

a Click the Add button and select the appropriate option.

The label on the Value box changes to reflect your selection.

b Enter the SQL expression or session variable name into the box.

SQL expressions can contain function calls that operate on column values. For more information, see Using Functions in Analyses (on page 1245) and Session Variables (on page 1285).

8 To remove a value, SQL expression or session variable, click the X icon next to it.

To remove all definitions, click the Clear Values button.

9 To have this filter restricted by the value of a column from the same subject area in another analysis, click the Advanced button and select the Filter based on results of another request option.

The Filter on Saved Request dialog box appears.

10 To convert the filter to SQL, click the Advanced button and select the Convert this filter to SQL option.

The Advanced SQL Filter dialog box appears.

11 When you have finished, click OK.

The filter appears in the Filters area on the Define Criteria page or on the Saved Filters page.

Usage Notes on Operators

Some operators do similar, but not exactly the same functions. Consider the similarities and differences between the following operators:

■ is equal to

■ is in

■ contains all

- contains any

- is LIKE

Is equal to or *is in* searches for an exact match between the search criteria and the values in the data base*. For example, if the criteria is Pat Lee, then only Pat Lee exactly matches and passes the filter. Because all searches are case sensitive, values such as pat Lee or Pat lee do not pass the filter.

Contains all searches for all the values that match the criteria, and all the values must be in the values to pass the filter, as in an AND search. For example, if the criteria is to search for two values; value = Pat and value =Lee, then Pat Lee and Lee Pat pass the filter, but pat Lee, Pat Smith and Chris Lee do not pass the filter because they do not contain all of the criteria (Pat AND Lee).

Contains any searches for values that match the criteria, but is less strict in that it does not require all the values, as in an OR search. For example, if the criteria is to search for two values; value = Pat, and value = Lee then Pat, Pat Smith, Chris Lee, and Lee all pass the filter because they meet the criteria of Pat OR Lee.

Is LIKE searches for patterns, and as such requires the use of one or two percentage symbols (%) as a wild card character. For example, if the search criteria is value = P%t %ee, then Pat Lee, Pit smee, and Packet trainee all pass the filter, but pat Lee does not.

For optimum search speed, reduce or eliminate the use of pattern matching operators such as Contains All, Contains Any, and Is LIKE. If you want to search by exact values, do not use pattern matching operators instead of exact operators.

Saving Column Filters

You can save a filter as part of an analysis or for reuse in other analyses. If a filter is for a specific analysis and you save the analysis, the filter is saved as part of the analysis and will be applied every time the analysis runs. You can also save the filter explicitly so it can be used in other analyses.

Saved filters and folders containing filters for the subject area appear after the name of the subject area. If there are no saved filters for the subject area, this part of the page is blank.

To save a column filter as part of an analysis

1 In the Define Criteria page, click Save.

2 In the Save Analysis dialog box, select the location in which to save the analysis and then click OK.

To save a column filter for use in other analyses

1 In the Define Criteria page, in the Filters section, click Save Filter.

2 In the Save Filter dialog box, select a folder in which to save the filter:

- To save the filter for your personal use, click My Filters.

   Filters saved in My Filters are only available to you.

- To save the filter for use by others, click Public Filters.

Filters saved in a public filters folder are available to other users who have permission to access the folder.

3 Enter a name for the filter.

4 (Optional) Enter a description for the filter.

5 Click OK.

To display the properties for a saved filter

■ In the Define Criteria page, in the Filters section, click the Filter Options icon next to the filter whose properties you want to display, and then select the Edit Filter option.

Applying Saved Column Filters to Analyses

You can apply a saved column filter to an analysis. You can apply either the contents of the filter or a reference to the filter.

When you apply the contents of a saved column filter, the actual contents of this filter are copied to the Filters area on the Define Criteria page. This allows you to manipulate the filter criteria without altering the saved filter. When you apply a reference to a saved filter, the saved filter is referenced by its name only, and you can view but not alter its contents.

To apply a saved column filter to an analysis

1 In the Define Criteria page, in the Filters section, click Open Saved Filter.

2 Navigate to the appropriate Filters folder, select the saved filter that you want to apply, and then click OK.

3 In the Apply Saved Filter dialog box, in the Filter Options section, specify your choices, if any.

4 Click OK.

The filter appears in the Filters area on the Define Criteria page.

Editing Column Filters

You can edit a column filter to change its properties.

To edit a column filter

1 In the Define Criteria page, in the Filters section, click the Filter Options button for the filter you want to edit, and then select Edit Filter.

The Create/Edit Filter dialog box appears.

2 Make your changes, and then click OK.

Editing the Formula for a Column Filter

You can edit the formula for a column filter. The edits that you make only apply to the filter's use of the column; a formula can contain calls to functions to perform more advanced calculations. See Using Functions in Analyses (on page 1245).

To edit the column formula for a filter

1   In the Define Criteria page, in the Filters section, click the Filter Options button for the filter, and then select Edit Column Formula.

2   Click the Column Formula tab.

3   Type the formula into the Column Formula area.

4   Click OK to save your changes.

Removing Column Filters

You can remove a single filter or all filters from an analysis.

NOTE: If the analysis was saved previously with filters applied, save the analysis again to remove the filters.

To remove a column filter from an analysis

■   In the Define Criteria page, in the Filters section, click the X icon.

Combining Column Filters with Other Column Filters

Combining column filters, also known as parenthetical filtering, allows you to create complex filters without having to know SQL.

You can combine column filters with AND and OR operators. The AND operator means that the criteria specified in each filter must be met. This is the default method for combining column filters. The OR operator means that the criteria specified in at least one of the column filters must be met.

To combine a column filter with other column filters

1   In the Define Criteria page, add at least two column filters to an analysis, or add at least two column filters to a saved filter.

    The filters are listed in the Filters section with an AND operator between them.

2   To change an AND operator to an OR operator, click it.

3   As you add column filters, click AND and OR operators to group filters and construct the desired filter combinations.

    Combined filters elements are bounded by boxes.

4 To cut, copy or ungroup bounded elements, click the Edit Filter Group button and select the appropriate option.

Preventing a Filter from Being Replaced During Navigation and Prompting

You can protect the contents of a filter in a report from being affected during navigation and prompting. A protected filter is always applied to results.

To protect a filter from being changed during navigation and prompting

- In the Define Criteria page, in the Filters section, click the Filter Options button for the filter, and then select Protect Filter.

Using Saved Reports as Filters

Filters can be combined with other filters, as well as being based on the values returned by another report. Any saved report that returns a column of values can be used to filter the selected column in your report.

To create a filter based on the results of another saved report

1 In the Define Criteria page, click the New Filter button in the column where you want to create the filter.

2 In the Create/Edit Filter dialog box, click Advanced, and then select the Filter based on results of another request option.

3 In the Filter on Saved Request dialog box, in the Relationship field, select the appropriate relationship between the results and the column to be filtered.

4 Click Browse and navigate to the saved report.

5 In the Use Values in Column field, select the column that is to be used for the filter.

   If the saved report contains a column name that matches the column where you are creating the filter, that column name appears first in the list of values in the Use Values in Column field. You can select a different column.

6 Click OK.

   The filter appears in the Filters section in the Define Criteria page.

   NOTE: If you later want to edit the filter, you can edit only the information shown in the Filter on Saved Request dialog box.

Editing the SQL for a Column Filter

You can edit the logical SQL WHERE clause to be used as a filter. While generally not necessary, this feature is available for users who need advanced filtering capability. For a comprehensive description of SQL syntax, refer to a third-party reference book on SQL, a reference manual on SQL from one of the database vendors or

an online reference site. For more general information about using SQL in Oracle CRM On Demand Answers, see Using Functions in Analyses (on page 1245).

To edit the SQL generated for a column filter

1 While in the Create/Edit Filter dialog box, click Advanced, and then select the Convert this filter to SQL option.

2 Enter your modifications in the text box and then click OK.

The filter appears in the Filters area on the Define Criteria page. Once you have chosen this option, editing the filter will always display the SQL that you entered.

Example: Identifying Customers with the Most Sales Volume

The following example reports data on the ten customers with the most sales volume in 2003.

```
"Close Date"."Calendar Year" = 2003

AND RANK("Opportunity Metrics"."Closed Revenue") <= 10
```

Editing Column Properties

You can edit properties for a column to control the appearance and layout of a column and its contents. You can also specify formatting that is only applied if the contents of the column meet certain conditions. By default, your selections for a column apply to the current report only.

Editing the Appearance of Column Contents

The default appearance of column contents in results is based on cascading style sheets and XML message files. You can use the Style tab of the Column Properties dialog box to override several default settings, such as the font and font size to be used. Your selections only apply to the contents of the column for the report on which you are working.

To edit the appearance of column contents

1 In Oracle CRM On Demand Answers, in the Define Criteria page, click the Column Properties button for the column.

2 In the Column Properties dialog box, click the Style tab.

3 Make your choices for font, cell, border, image and advanced style formatting options.

For more information, see Formatting Column Content in this topic.

4 In the Data Format tab, you can control the way the data is displayed by selecting the Override Default Data Format checkbox.

This option allows you to override the default display characteristics. The selections that you see vary according to the data type. For example, if the column contains numeric data, you can select how you want the numbers to be treated, such as percentages, month names or dates. You can select the number of decimal places to be displayed, how to display negative numbers, the number of digits to be shown and the thousands separator to be used. If your column contains text, you can select how to treat the text, such as plain text, HTML or a link. Based on your selection, the Custom Text Format text box displays the applicable HTML string used to display the data.

To use a custom format for text, select Custom Text Format from the Treat Text As drop-down list and then enter the custom format. You can enter HTML calls that provide special formatting. You can also enter any valid HTML string, including JavaScript, VBScript and so on.

For example, the following example HTML sets the column width and height in tables and pivot tables. In the example, the text html enclosed in brackets ([html]) means to use HTML, and the "at" sign character (@) represents the dynamic contents of the column.

[html]@

If you do not know HTML, JavaScript, VBScript and so on, you can consult a third-party reference.

To create a custom numeric format, you can use the number sign (#) to include significant digits, and the number zero (0) to include as many digits as specified, even if the number does not contain that detail. These are examples:

Specifying ##.# shows 12.34 as 12.3

Specifying ##.000 shows 12.34 as 12.340

5   Click OK when you have finished.

Editing the Layout of Column Contents

Use the Column Format tab in the Column Properties dialog box to perform the following tasks:

◼ Specify whether the column should appear in results.

Columns are usually visible in results by default. However, you may want to include a column in your report that you do not want displayed in the results, such as a column used for creating a filter.

◼ Assign alternate table and column headings and apply custom formatting to these.

◼ Control the display of duplicate data such as repeating column values.

The data in one column of a table may be repeated in relation to rows of data in other columns in the table. For example, if one column lists customer names and another column lists the regions in which those customers are based, the region data could be repeated for each customer row. You can select to display duplicate data once only, or display it for every row. Displaying repeating or duplicated data once only can make a table somewhat easier to read, and can make distinctions in the data more apparent.

◼ Specify the interaction that should occur when users work with the results, such as navigation to another report.

You can also use functions and conditional expressions to format results in a variety of ways.

Your selections only apply to the contents of the column for the report on which you are working.

To hide a column in results

1 In Oracle CRM On Demand Answers, in the Define Criteria page, click the Column Properties button for the column.

2 In the Column Properties dialog box, click the Column Format tab.

3 Select the Hide this column checkbox, if it is not already selected.

To create custom table and column headings

1 In Oracle CRM On Demand Answers, click Define Criteria.

2 Click the Column Properties button for the column.

   If you have combined results from multiple reports, then the Column Properties button is at the result-column level. For more information about reports, see Combining Results from Multiple Reports Using Set Operations (on page 1190).

3 In the Column Properties dialog box, click the Column Format tab.

4 In the Headings area, select the Custom Headings checkbox.

   This allows you to change the heading text and the heading formatting.

5 To change the text of the table or column heading, enter a new heading in the appropriate text box.

   The heading will be used in this report instead of the default heading.

   NOTE: You can also specify navigation to another report in the Column Heading Interaction area.

6 To change the format of the table or column heading, click the Edit Format button next to the text box.

   The Edit Format dialog box appears.

   Make your choices for font, cell, border and advanced style formatting options. For more information, see "*Formatting Column Content*" below.

To suppress duplicate data

1 In Oracle CRM On Demand Answers, in the Define Criteria page, click the Column Properties button for the column.

2 In the Column Properties dialog box, click the Column Format tab.

3 On the Value Suppression area, select the appropriate option:

   ■ Select Suppress to display repeating data once only and suppress duplicate rows.

   ■ Select Repeat to display repeating data for every row.

   ■ Select Default to retain the default display characteristics.

To specify what happens when users click the column

1 In Oracle CRM On Demand Answers, in the Define Criteria page, click the Column Properties button for the column.

2 In the Column Properties dialog box, click the Column Format tab.

3 To specify what should happen when users click the column, select the appropriate option in the Column Heading Interaction area:

- Default - Restores the default interaction.

- Drill - Allows you to drill down, so that you can view more information.

- Navigate - Allows navigation to another analysis. Click the Add Navigation Target button, browse to a target report or dashboard, click OK, and enter a caption for the target in the Caption text box. Repeat this step for each navigation target that you want to add. Click the Remove button beside the Caption text box to remove that navigation target.

- No interaction - Disables drilling or navigation. Interactions are defined separately for a column heading and the data in a column.

To specify what happens when users click a value

1 In Oracle CRM On Demand Answers, in the Define Criteria page, click the Column Properties button for the column.

2 In the Column Properties dialog box, click the Column Format tab.

3 To specify what should happen when users click a value, select the appropriate option in the Value Interaction area:

- Default - Restores the default interaction.

- Drill - Allows you to drill down, so that you can view more information.

- Navigate - Allows navigation to another analysis. Click the Add Navigation Target button, browse to a target report or dashboard, click OK, and enter a caption for the target in the Caption text box. Repeat this step for each navigation target that you want to add. Click the Remove button beside the Caption text box to remove that navigation target.

- No interaction - Disables drilling or navigation. Interactions are defined separately for a column heading and the data in a column.

Applying Conditional Formatting to the Column Contents

In tables and pivot tables, conditional formatting helps direct attention to a data element if it meets a certain condition. For example, you can show high revenue sales figures in a certain colour, or display an image such as a trophy next to the name of each salesperson who exceeds revenue by a certain percent.

You do this by selecting one or more columns in the report to be used, specifying the condition to meet, and then making selections for font, cell, border and style sheet options to be applied when the condition is met. The conditional formats can include colours, fonts, images, and so on, for the data and for the table cell that contains the data. The steps required to specify a condition are very similar to those used to create filters.

You can add multiple conditions so that the data and the table cell are displayed in one of several formats, based on the value of the data. For example, low revenue sales can be displayed in one colour, and high revenue sales can be displayed in another colour.

Several subtle conditional formatting differences exist between traditional tables and pivot tables. Conditional formats that format one column based on the value of another column are not reflected in a pivot table, but are reflected in a standard table. For example, setting the colour of a region name based on the sales in that region has no effect in a pivot table. However, setting the colour of the sales data based on the value of the sales data is reflected in a pivot table, as is setting the colour of the region name based on the actual name; for example, displaying a value of Eastern Region in bold coloured text.

NOTE: In pivot tables, conditions are evaluated against the values as calculated or aggregated by the pivot table. Conditional formatting is applied based on the underlying value, even if you select the Show As options to show the data as percentages or indexes.

Your selections only apply to the contents of the column for the report on which you are working.

To add conditional formatting to a column in a report

1   In Oracle CRM On Demand Answers, in the Define Criteria page, click the Column Properties button for the column.

2   In the Column Properties dialog box, click the Conditional Format tab.

3   Click the Add Condition button and select the desired column in the report for use in constructing the condition.

    The Create/Edit Filter dialog box opens. Select the operator and value for the condition.

    NOTE: When you access the Create/Edit Filter dialog box from the Conditional Format tab, the dialog box only shows the options that apply to conditional formats. For example, the Operator drop-down list shows the subset of operators that are used in conditional formats.

4   Click OK in the Create/Edit Filter dialog box.

    The Edit Format dialog box appears.

5   Make your choices for font, cell, border, image and advanced style formatting options.

    For more information, see Formatting Column Content in this topic.

    NOTE: If you specify an image as part of the conditional formatting, it appears conditionally in the results.

6   When you have finished, click OK to return to the Column Properties dialog box.

    The Column Properties dialog box shows the condition, and the conditional formatting to be applied.

    Columns are evaluated in the order that they are listed.

    ■   To reorder a column, click the Move Up or Move Down buttons.

    ■   To delete a column from the condition, click the Delete button.

    ■   Click a condition or conditional format to edit it.

7 You can specify another condition to be included, or click OK if you are finished.

The following example describes how conditional formatting can be applied to results.

Suppose a report includes ten ranking categories, with a value of 1 in the column indicating the worst ranking, and a value of 10 indicating the best ranking. You could apply conditional formatting to show the following:

■ One image to indicate a low rank for columns that contain 1, 2 or 3.

■ Another image to indicate an average rank for columns that contain 4, 5, 6 or 7.

■ A third image to indicate a high rank for columns that contain 8, 9 or 10.

In the Graphics dialog box, select the Images Only image placement option. In the results display, the columns only appear with the images, and not the ranking numbers.

Formatting Column Content

Use the Edit Format dialog box (and the options on the Style tab of the Column Properties dialog box) to select font, cell, border and advanced style formatting options for column data that is shown inside a cell in a tabular format, such as a table or pivot table. You can also select settings for table and column headings.

If you are overriding the default formatting properties for a column, your selections are static. If you are specifying conditional formatting properties for a column, your selections only apply if the condition is met.

To use the Edit Format dialog box or the Style tab of the Column Properties dialog box

1 In Oracle CRM On Demand Answers, in the Define Criteria page, click the Column Properties button for the column.

2 In the Column Properties dialog box, click the Style tab.

3 In the Font area, make your selections for font family, size, colour, style (such as bold), and any effects to apply (such as underlining).

4 In the Cell area, make your selections for alignment, background colour, and an image to display inside the cell.

■ The selections for horizontal and vertical alignment are similar to text justification selections in word processors. Vertical alignment does not have any impact unless the column spans multiple rows of other columns.

For horizontal alignment:

Select Left to left-justify the data. This is the most common justification for text data. Select Right to right-justify the data. This is the most common justification for numeric data. Select Centre to centre the data. To retain the default data alignment associated with this column, select Default.

For vertical alignment:

Select Top to align the data to the top of the table cell. Select Bottom to align the data to the bottom of the table cell. Select Centre to align the data to the middle of the table cell. To retain the default vertical alignment associated with this column, select Default.

■ When you click the Image button, the Graphics dialog opens.

   ■ Select the No Image option if you do not want to include an image.

   ■ To include a custom image, select the Custom Image option and specify the appropriate path in the text box. The image should be one that is accessible to all users who will view the results. Custom images can be used for both conditional and unconditional results.

   ■ To include an image distributed with Oracle CRM On Demand Answers, use the graphics selection window. The window shows images that are useful in conditional formatting, such as meters and trend arrows. The left pane shows the categories of images. When you click on an image category, the right pane shows the images in that category. Make your selection by selecting the radio button next to the image that you want to use.

   ■ To specify the location of the image within the cell, make a selection from the Image Placement drop-down list:

   Default - Displays any images in the default position, which is usually to the left of the column data or heading.

   Images Left - Displays any images to the left of the column data or heading.

   Images Right - Displays any images to the right of the column data or heading.

   Images Only - Displays the image only, and not the column data or heading.

5 In the Border area, make your selections for the border position, colour, and style of the cell.

6 In the Additional Formatting Options area, make your selections for column width, height, indent (left padding), right padding, top padding and bottom padding.

7 In the Custom CSS Style Options (HTML Only) area, you can override style and class elements specified in Oracle CRM On Demand Answers style sheets. This capability is for users who know how to work with cascading style sheets.

   ■ Expand the Custom CSS Style Options (HTML Only) area by clicking the + icon.

   ■ Click the checkbox beside the settings that you want to use, and then provide the location of the class, style or style sheet.

   For example, for Use Custom CSS Style you can enter valid CSS style attributes, separated by semicolons, such as:

   `text-align: centre; colour: red`

8 When you have finished, click OK to close the dialog box.

Using Custom Date/Time Format Strings

Custom date/time format strings provide additional options for formatting columns that contain timestamps, dates and times.

To enter a custom date/time format string

1   In Oracle CRM On Demand Answers, in the Define Criteria page, click the Column Properties button for a column that contains a timestamp, a date, or a time.

2   In the Column Properties dialog box, select the following option in the Data Format area: Override Default Data Format check box.

3   In the Date Format field, select Custom from the drop-down list.

4   In the Custom Date Format field, type the custom format string exactly as shown in the following tables, including left and right bracket characters ([ ]).

   NOTE: You must type the custom format string in the Custom Date Format field. Custom format strings are not available for selection from the drop-down list.

General Custom Format Strings

The following table describes some general custom format strings and the results that they display. These allow the display of date/time fields in the user{\f2 '}s locale.

General Format String	Result
[FMT:dateShort]	Formats the date in the locale{\f2 '}s short date format. You can also type [FMT:date].
[FMT:dateLong]	Formats the date in the locale{\f2 '}s long date format.
[FMT:dateInput]	Formats the date in a format acceptable for input back into the system.
[FMT:time]	Formats the time in the locale{\f2 '}s time format.
[FMT:timeHourMin]	Formats the time in the locale{\f2 '}s time format but omits the seconds.
[FMT:timeInput]	Formats the time in a format acceptable for input back into the system.
[FMT:timeInputHourMin]	Formats the time in a format acceptable for input back into the system, but omits the seconds.
[FMT:timeStampShort]	Equivalent to typing [FMT:dateShort] [FMT:time]. This formats the date in the locale{\f2 '}s short date format and the time in the locale{\f2 '}s time format. You can also type [FMT:timeStamp].
[FMT:timeStampLong]	Equivalent to typing [FMT:dateLong] [FMT:time]. This formats the date in the locale{\f2 '}s long date format and the time in the locale{\f2 '}s time format.
[FMT:timeStampInput]	Equivalent to [FMT:dateInput] [FMT:timeInput]. This formats the date and the time in a format acceptable for input back into the system.
[FMT:timeHour]	Formats the hour field only in the locale's format, such as 8 PM.

ODBC Custom Format Strings

The following table shows the ODBC standard typed custom format strings and the results they display. These display date/time fields according to the ODBC standard.

ODBC Format String	Result
[FMT:dateODBC]	Formats the date in standard ODBC yyyy-mm-dd format (4-digit year, 2-digit month, 2-digit day).
[FMT:timeODBC]	Formats the time in standard ODBC hh:mm:ss format (2-digit hour, 2-digit minute, 2-digit second).
[FMT:timeStampODBC]	Equivalent to typing [FMT:dateODBC] [FMT:timeStampODBC]. This formats the date in yyyy-mm-dd format, and the time in hh:mm:ss format.
[FMT:dateTyped]	Displays the word date and then shows the date, in standard ODBC yyyy-mm-dd format. The date is shown within single quote characters (').
[FMT:timeTyped]	Displays the word time and then shows the time, in standard ODBC hh:mm:ss format. The time is shown within single quote characters ({\f2 (').}
[FMT:timeStampTyped]	Displays the word timestamp and then the timestamp, in standard ODBC yyyy-mm-dd hh:mm:ss format. The timestamp is shown within single quote characters (').

Custom Format Strings for Integral Fields

The following table shows the custom format strings that are available when working with integral fields. These allow the display of month and day names in the user{\f2 's} locale.

Integral fields hold integers that represent the month of the year or the day of the week. For months, 1 represents January, 2 represents February and so on, with 12 representing December. For days of the week, 1 represents Sunday, 2 represents Monday and so on, with 7 representing Saturday.

Integral Field Format String	Result
[MMM]	Displays the abbreviated month name in the user{\f2 '}s locale.
[MMMM]	Displays the full month name in the user{\f2 '}s locale.
[DDD]	Displays the abbreviated day of the week in the user{\f2 '}s locale.
[DDDD]	Displays the full day of the week in the user{\f2 '}s locale.

Custom Format Strings for Conversion into Hours

The following table shows the custom format strings that can be used to format data in hours. These can be used for the following types of fields:

- Fields that contain integers or real numbers that represent the time that has elapsed since the beginning of the day (12:00 AM).

- Fields where the output is in [FMT:timeHour] format. (This format displays the hour field only in the locale{\f2 '}s format, such as 8 PM.)

Data Conversion Format String	Result
[FMT:timeHour]	This assumes that the value represents the number of hours that have elapsed since the beginning of the day, and formats the number of hours in an hh display, where hh is the number of hours. Fractions are dropped from the value. For example, a value of 2 is formatted as 2 AM, and a value of 12.24 as 12 PM.
[FMT:timeHour(min)]	This assumes that the value represents the number of minutes that have elapsed since the beginning of the day, and formats the number of minutes in an hh display, where hh is the number of hours. Fractions are dropped from the value. For example, a value of 2 is formatted as 12 AM, and a value of 363.10 as 06 AM.
[FMT:timeHour(sec)]	This assumes that the value represents the number of seconds that have elapsed since the beginning of the day, and formats the number of seconds in an hh display, where hh is the number of hours. Fractional hours are dropped from the value. For example, a value of 600 is formatted as 12 AM, a value of 3600 as 1 AM and a value of 61214.30 as 5 PM.

Custom Format Strings for Conversion into Hours and Minutes

The following table shows the custom format strings that can be used to format data in hours and minutes. These can be used for fields that contain integers or real numbers that represent the time that has elapsed since the beginning of the day (12:00 AM).

They can also be used where the output is in [FMT:timeHourMin] format. (This format displays the time in the locale{\f2 '}s time format, but omits the seconds.)

Data Conversion Format String	Result
[FMT:timeHourMin]	This assumes that the value represents the number of minutes that have elapsed since the beginning of the day, and converts the value to an hh:mm display, where hh is the number of hours and mm is the number of minutes. Fractions are dropped from the value. For example, a value of 12 is formatted as 12:12 AM, a value of 73 as 1:13 AM and a value of 750 as 12:30 PM.
[FMT:timeHourMin(sec)]	This assumes that the value represents the number of seconds that have elapsed since the beginning of the day, and converts the value to an hh:mm display, where hh is the number of hours and mm is the number of minutes. Fractions are dropped from the value. For example, a value of 60 is formatted as 12:01 AM, a value of 120 as 12:02 AM and a value of 43200 as 12:00 PM.
[FMT:timeHourMin(hour)]	This assumes that the value represents the number of hours that have elapsed since the beginning of the day, and converts the number of hours to an hh:mm display, where hh is the number of hours and mm is the remaining number of minutes. For example, a value of 0 is formatted as 12:00 AM, a value of 1.5 as 1:30 AM and a value of 13.75 as 1:45 PM.

Custom Format Strings for Conversion into Hours, Minutes and Seconds

The following table shows the custom format strings that can be used to format data into hours, minutes and seconds. These can be used on fields that contain integers or real numbers that represent time.

They can also be used where the output is in [FMT:time] format, described in the topic General Custom Format Strings. (This format displays the time in the locale{\f2 '}s time format.)

Data Conversion Format String	Result
[FMT:time]	This assumes that the value represents the number of seconds that have elapsed since the beginning of the day, and converts the value to an hh:mm:ss display, where hh is the number of hours, mm is the number of minutes and ss is the number of seconds. For example, a value of 60 is formatted as 12:01:00 AM, a value of 126 as 12:02:06 AM and a value of 43200 as 12:00:00 PM.
[FMT:time(min)]	This assumes that the value represents the number of minutes that have elapsed since the beginning of the day, and converts the value to an hh:mm:ss display, where hh is the number of hours, mm is the number of minutes and ss is the number of seconds. For example, a value of 60 is formatted as 1:00:00 AM, a value of 126 as 2:06:00 AM and a value of 1400 as 11:20:00 PM.
[FMT:time(hour)]	This assumes that the value represents the number of hours that have elapsed since the beginning of the day, and converts the value to an hh:mm:ss display, where hh is the number of hours, mm is the number of minutes and ss is the number of seconds. For example, a value of 6.5 is formatted as 6:30:00 AM, and a value of 12 as 12:00:00 PM.

Advanced Custom Formats

In addition to the formats previously described, you can format dates and times by creating your own format using some of the common date and time formats described in the following table.

For example, using the following formats, you can create the format:

dddd - h:mm tt

which formats the date stamp fields in the following way:

Monday - 4:03 PM

NOTE: When using these formats, do not include the square brackets ([ ]) that are required with other formats.

While the following formats do provide greater formatting flexibility, they do not allow date formats to change according to the user's locale setting, which is possible with many of the previous formats.

Some common date and time formats are described in the following table.

Format	Result
d	Number of the day of the month (for example: 1 to 31). Single-digit numbers do not have a leading zero (0).
dd	Like d, but single-digit numbers begin with a 0.

Format	Result
ddd	Three-letter abbreviation for the day of the week (for example: Sun, Mon).
dddd	Full name of the day of the week (for example: Sunday, Monday).
M	Month number (for example, 1, 12). Single-digit numbers do not have a leading 0.
MM	Similar to M, but single-digit numbers begin with a 0.
MMM	Three-letter abbreviation for the month (for example: Jan, Feb).
MMMM	Full name for the month (for example: January, February).
yy	Two-digit number for the year (for example: 06).
yyyy	Four-digit number for the year (for example: 2006)
h	Hour in a 12-hour format. Single-digit numbers do not have a leading 0.
hh	Similar to h, but single-digit numbers begin with a 0.
H	Hour in 24-hour format. Single-digits do not have a leading 0.
HH	Similar to H, but single-digit numbers begin with a 0.
m	Number of minutes. Single-digit numbers do not have a leading 0.
mm	Similar to m, but single-digit numbers begin with a 0.
s	Number of seconds. Single-digit numbers do not have a leading 0.
ss	Similar to s, but single-digit numbers begin with a 0.
tt	AM and PM indicator. Use with h and hh formats.

Setting Up Column Formulas

Advanced users can create new formulas, or edit existing formulas, using built-in functions. Oracle CRM On Demand Answers supports a wide variety of SQL-92 functions, as well as extensions to SQL-92. For information about the available functions, see Using Functions in Analyses (on page 1245).

To edit or add a formula

1   In Oracle CRM On Demand Answers, in the Define Criteria page, click the Edit Formula button for a column whose formula you want to edit or add.

2   In the Edit Column Formula dialog box, select the Column Formula tab.

3   Select the Custom Headings check box if you want to change the table heading and column heading text.

4   Modify the formula, as required, using the buttons below the Column Formula box.

5   Select an aggregation rule from the Aggregation Rule drop-down list, as required.

6   Select the Bins tab and combine multiple values or ranges into bins, if required.

     For more information, see the To combine multiple values or ranges into bins procedure in this topic.

7   Click OK.

     In an analysis, you can also use functions and conditional expressions to present search results in a variety of ways.

To combine multiple values or ranges into bins

1   In the Edit Column Formula dialog box, select the Bins tab.

2   Click Add Bin, enter or select the values or ranges of the value that you want to combine into the bin, then click OK.

3   In the Edit Bin Name dialog box, enter the name for the bin.

4   Repeat steps 2 and 3 until you have added all the bins that you want.

     All instances of the different values that make up the bin in the result set will be replaced by the bin name. Aggregations are performed accordingly as well.

Adding Action Links to Results

You can add action links to results. Action links allow users to access record detail pages by clicking links on records in reports. You add action links using the following methods:

- **Using Action Link classes.** Using this method, you can configure the record type name in the report as an action link. The Action Link class takes the Row ID value in the report, and uses it to retrieve the specific record from Oracle CRM On Demand. You can use this method for the following record types: Account, Campaign, Contact, Lead, Opportunity, Service Request, and User.

- **Using URLs.** Using this method, you can create links to any record type from a table or pivot table view. You can configure the record type ID column as an action link.

NOTE: If users click Action links on a page that has a dynamic layout, then the links are displayed with the standard layout for that page.

About Record Type Names in Action Links

When you add an action link, you must use the original record type name in the code or URL that adds the link. If your company administrator has changed the names of record types in Oracle CRM On Demand, you must determine the original name of the record type where you want to add the link. For example, your company administrator might have renamed the Account record type so that is now called the *Customer* record type. If you want to add an action link to a result for the Customer record type, the link code or URL

must refer to the Account record type (that is, the original name of the record type). Depending on the type of link that you want to create, use the record type name in your code or URL as follows:

- When adding an action link for the Customer record type (originally the Account record type) using Action Link classes, use the *account* record type name in the link code, as shown in the following example:

  ```
  [html]"<a onClick=\"javascript:LinkOccam (this, 'account');\">"@"</a>"
  ```

  When you add action links using Action Link classes, the record type name must be all lowercase letters in the link code.

  TIP: To determine the original name of the record type for which you want to add a link, open the Homepage for the record type. The URL in the Address field in your browser window shows the original name of the record type. In the example where the Account record type was renamed to *Customer*, the Customer Homepage shows the following URL:

  ```
  https://server_name/OnDemand/user/AccountHomePage
  ```

  where:

  server_name is the URL used for signing in to Oracle CRM On Demand

- When adding an action link for the Customer record type (originally the Account record type) using a URL, use the *Account* record type name in the URL, as shown in the following example:

  ```
  "http://"@[html]"<a target=_top
  href=https://server_name/OnDemand/user/AccountDetail?OMTGT=AccountDetailForm&OMTHD=Acc
  ountDetailNav&AccountDetailForm.Id="@">"@"</a>"
  ```

  TIP: To determine the correct URL for the Detail page for a record type, open the Detail page for any record of that record type. In the Address field in your browser window title bar, copy the relevant part of the address string, from *http* to *Id=*. In the example where the Account record type was renamed to Customer, the URL is copied from the Detail page of a Customer record.

  In some cases, the full record type name is used in all places in the URL for a record type detail page, as is the case with the URL shown in the preceding example. However, in other cases, an abbreviated version of the record type name is used in certain locations in the URL.

  For example, if the record type for which you are adding the link was originally the Opportunity record type, the URL is as follows:

  ```
  "http://"@[html]"<a target=_top
  href=https://server_name/OnDemand/user/OpportunityDetail?OMTGT=OpptyDetailForm&OMTHD=O
  pportunityDetailNav&OpptyDetailForm.Id="@">"@"</a>"
  ```

The following procedure describes how to add action links using Action Link classes.

To add action links using Action Link classes

1 In Oracle CRM On Demand Answers, in the Define Criteria page, add the columns to the report.

   You must add the record type name field (for example, Account Name) and the record type ID field (for example, Account ID) to the report, and you must place the ID field immediately to the right of the name field in the report layout.

2 Click the Column Properties button for the record type ID column.

3 In the Column Properties dialog box, click the Column Format tab.

4 In the Column Format tab, select the Hide this column check box, and click OK.

5 In the Define Criteria page, click the Column Properties button for the record type Name column.

6 In the Column Properties dialog box, click the Style tab.

7 In the Style tab, do the following:

    a Expand the Custom CSS Style Options (HTML Only) area by clicking the plus (+) icon.

    b Select the Use Custom CSS Class check box, and type *ActionLink* in the text box.

8 Click the Data Format tab.

9 In the Data Format tab, do the following:

    a Select the Override Default Data Format check box.

    b In the Treat Text As list, select Custom Text Format.

    c In the Custom Text Format field, type text similar to the following example after the at sign (@).

In this example, an action link is created for an account:

```
[html]"<a onClick=\"javascript:LinkOccam (this, 'account');\">"@"</a>"
```

To create an action link for one of the other record types that supports action links created with Action Link Classes, replace the word *account* in the preceding example with *campaign*, *contact*, *lead*, *opportunity*, *service*, or *user*, as appropriate. The record type name must be all lowercase letters.

NOTE: You must use the original record type name in the link code. If your company administrator has renamed the record types in Oracle CRM On Demand, you must determine the original name of the record type where you are adding the action links, and use that name in the link code.

10 Click OK.

11 To preview the report, click Preview Analysis.

The following procedure describes how to add action links using URLs. You can use this procedure to add action links for any record type.

To add action links using URLs

1 In Oracle CRM On Demand Answers, in the Define Criteria page, add the columns to the report, including the record type ID (for example, Account ID) column.

NOTE: For the action link to work, you must add the record type ID field to the report.

2 Click the Column Properties button for the record type ID column.

3 In the Column Properties dialog box, click the Data Format tab.

4 In the Data Format tab, do the following:

   a Select the Override Default Data Format check box.

   b In the Treat Text As list, select Custom Text Format.

   c In the Custom Text Format field, enter the code for the link after the at sign (@), as shown in the following example:

   ```
   "http://"@[html]"<a target=_top
   href=https://server_name/OnDemand/user/OpportunityDetail?OMTHD=OpportunityDetailNav&OM
   TGT=OpptyDetailForm&OpptyDetailForm.Id="@">"@"</a>"
   ```

   where:

   server_name appears in the example, substitute the URL that you use to sign in to Oracle CRM On Demand.

In the preceding example, the URL is for the Opportunity record type. Use the appropriate URL for your Oracle CRM On Demand server and the record type for which you are creating the link.

NOTE: You must use the original record type name in the URL. If your company administrator has renamed the record types in Oracle CRM On Demand, you must determine the original name of the record type where you are adding the action links, and use that name in the URL.

Oracle CRM On Demand Answers replaces the final at sign (@) in the string with the value of the record type ID for each record in the report. If you do not want the link to display the record type ID, replace the final at sign (@) with the text that you want to be displayed. In the following example, the ID in the action link will be replaced with the word *View*:

```
"http://"@[html]"<a target=_top
href=https://server_name/OnDemand/user/OpportunityDetail?OMTHD=OpportunityDetailNav&OM
TGT=OpptyDetailForm&OpptyDetailForm.Id="@">View</a>"
```

5 Click OK.

6 To preview the report, click Preview Analysis.

The following example shows the code to use for a link on an asset record:

```
"http://"@[html]"<a target=_top
href=https://server_name/OnDemand/user/AssetDetail?OMTHD=AssetDetailNav&OMTGT=AssetDetail
Form&AssetDetailForm.Id="@">"@"</a>"
```

The following example shows the code to use for a link on an appointment record:

```
"http://"@[html]"<a target=_top
href=https://server_name/OnDemand/user/ApptDetail?OMTHD=ApptRead&OMTGT=ApptDetailForm&App
tDetailForm.Id="@">"@"</a>"
```

The following example shows the code to use for a link on a task record:

```
"http://"@[html]"<a target=_top
href=https://server_name/OnDemand/user/TaskDetail?OMTHD=ReadTaskDetail&OMTGT=TaskDetailFo
rm&TaskDetailForm.Id="@">"@"</a>"
```

Sorting and Reordering Columns

You can select the sort order for the data in a column as well as make sure the columns appear in the order you want.

You can specify the sort order for one or more columns that appear in an analysis. When you click the Order By button, it shows a new image to indicate the sort order that the selected column will apply to the results.

To sort an analysis based on columns

1 In Oracle CRM On Demand Answers, in the Define Criteria page, click the Order By button for the column you want to sort by.

The button changes to indicate the sort order.

2 Continue clicking the Order By button until the sort order you want appears.

The following table describes the available sort orders.

Button	Description
	The selected column will not be used to sort the results.
	The results will be sorted in ascending order, using the items in the selected column.
	The results will be sorted in descending order, using the items in the selected column.
	A number that appears on an Order By button indicates that the column is not the primary sort column applied to the results. The number corresponds to when the sort order is applied. In this example, the column is used as the second sort order column. The up arrow indicates that the results are sorted in ascending order, using the items in the selected column.

About Using Addresses in Reports

Many reports require the use of address fields. In Oracle CRM On Demand, you can generate reports about addresses in two different ways, depending on your needs. In the Active Subject Area in Oracle CRM On Demand Answers, an address folder with the word Extended in it (for example, Billing Address - Extended) provides reporting on all nine standard address fields included with Oracle CRM On Demand. For details on how each field maps to the address format for specific countries, see About Countries and Address Mapping.

Fields included from the address Extended folder are not drillable in reports. Field labels display consistently regardless of the country for each record or the user's default, company country in Oracle CRM On Demand.

Most of the other address fields in the Active Subject Area in Oracle CRM On Demand Answers (those not in the Extended folder) are drillable when included in reports. The fields displayed match those fields associated with the user's default, company country in Oracle CRM On Demand. However, all fields might not appear if the country associated with a specific record is not the same as the user's default, company country in Oracle CRM On Demand.

Combining Results from Multiple Reports Using Set Operations

After you select a subject area and add columns to a report, you can combine criteria from one or more subject areas using Set operations. This action combines the results of two or more reports into a single report.

NOTE: The number and data types of the columns selected in each component must be the same. The column lengths can differ.

The following table lists the Set operators and describes their effects on results.

Set Operator	Effect on Results
Union	Returns nonduplicate rows from all reports.
Union All	Returns all rows from all reports, including duplicate rows.
Intersect	Returns rows that are common to all reports.
Minus	Returns rows from the first report that are not in the other reports.

To combine the results of multiple reports

1   In Oracle CRM On Demand Answers, in the Define Criteria page, click the plus sign in the Advanced section, and then click Combine with Similar Analysis.

2   In the Subject Area dialog box, select a subject area that contains the data that you want to combine with the columns in your report.

The subject area can be the same as the subject area from which the existing columns in the report are taken or a different subject area.

The Set Operations page appears.

3   Follow the onscreen instructions to build the combined report.

4   Click the Set button and select the operation type.

5   Select columns from the selection area to combine with the first report.

6   If required, define the filters that are specific to the current subject area.

7 Add additional subject areas by clicking Edit in the Set Operations section, and then choose Create New Criteria.

8 Edit column characteristics (format column, sort) for the combined report by clicking Result Columns in the Set Operations section.

This action displays the resulting columns with buttons that you can use to edit format and sorting.

Step 2: Creating Layouts

After you define the criteria, you should create the layout for your report. In this step, you can add more views to your layout. These initially show up at the bottom of your layout. You can also add subtotals and totals to your columns.

Views use the presentation capabilities to help you look at results in meaningful, intuitive ways. You can add a variety of views to results, such as charts and pivot tables that allow you to drill down to more detailed information, explanatory text, a list of filters that were used to limit the results, and more.

When you run a new report, Oracle CRM On Demand Answers initially displays results in a table, with a title preceding the table. It does this by including a Title view, which displays the name of the saved report, and a Table view, which displays the results in a basic table that inherits the formats, sorting and other options specified in the Define Criteria step. You can customise or delete these existing views for a report, add other views, and combine and position views anywhere in the workspace.

Preparing multiple views of results can help you to identify trends and relationships in data. You can then save the report with the collection of views.

You define the layout of your reports in the Create Layout page in Oracle CRM On Demand Answers. To access the Create Layout page, either create a new analysis, as described in Getting Started with Answers (Custom Reports) (on page 933), or open an existing analysis in Oracle CRM On Demand Answers.

Your layout can include any views shown in the following table.

Layout	Description
Title	Use this view to include a title and subtitle, a saved name for the results and a custom logo to identify the results. For result-specific help, you can include a help icon that links to any HTML page or site that contains information about the report or the results.
Table	Use this view to display data in a column format. You can select to display one page of information at a time, which is convenient for larger result sets, and control the size of the page and the position of the paging controls. Tables are supported in a wide variety of formats and can include graphics, links and so on, using custom formatters. Using Table view, users can also change the format of the table headings.

Layout	Description
Chart	Use this view to drag and drop columns to a layout chart. You have complete control over the title, the location of the legend, axis titles and data labels. You can control the size and scale of the chart, and control colours using a style sheet. In addition, you can drill down into the results. Supported chart types include bar charts, column charts, line charts, area charts, pie charts, scatter charts, bubble charts and custom subtypes including 2D, 3D, absolute, clustered, stacked, combination and custom.
Pivot table	Use this view if you want to be able to take row, column and section headings and swap them around to obtain different perspectives. You can drag and drop headings to pivot results, preview them and apply the settings. Users can navigate through pivot tables and drill down into information. Users can create complex pivot tables that show aggregate and non-related totals next to the pivoted data, allowing for flexible analysis. For an interactive result set, elements can be placed in pages, allowing users to select elements. Like the Table view, elements can be formatted using custom formatters.
Gauge	Use the gauge view to show results as gauges, such as dial, bar and bulb-style gauges.
Active filters	Use this view to show the filters in effect for a report.
Static text	Use this view to include static text in the results. You can use HTML to include banners, tickers, Active-X objects, Java applets, links, instructions, descriptions, graphics and so on, in the results.
Legend	Use the Legend view to document the meaning of special formatting used in results, such as the meaning of custom colours applied to gauges.
Column selector	Use column selectors to allow users to dynamically change which columns are displayed in the analysis. This allows users to analyse data along several dimensions and dynamically alter the content of the results.
View Selector	Use the View Selector view to select a specific view of the results from the saved views. When placed on a dashboard, the view selector appears as a drop-down list where users can make a selection.
Funnel chart	Use this view to display a three-dimensional chart that represents target and actual values using volume, level and colour. It is useful for depicting target values that decline over time, such as a sales pipeline.
Narrative	Use this view to display the results as one or more paragraphs of text. You can enter in a sentence with placeholders for each column in the results, and specify how rows should be separated. You can incorporate custom HTML or JavaScript to specify how information is displayed.

Layout	Description
Ticker	Use this view to display the results of a report as a ticker or marquee, similar in style to the stock tickers that run across many financial sites on the Web. This view is useful for calling attention to results and for late-breaking information. You can control what information is presented and how it scrolls across the page. This view supports a variety of formats and can include graphics, links and so on, using custom formatters.
No Results	Use this view to specify explanatory text that is to appear if the report does not return any results.

Printing Controls

You can specify the print settings for the report in the Layout tab by clicking the hand icon to the left of the Layout Views control. In the dialog box of printing controls, you can adjust the following:

Page Settings:

- Paper Size (User Default, US Letter, A4. A3, A5, Folio, and Legal)

- Orientation (Portrait, Landscape)

- Print Rows (Visible Rows, All)

- Maximum Width (Check box for using margin space)

Header and Footer:

- Include and Edit Header

    - Specify the Header text and choose appropriate formats

- Include and Edit Footer

    - Specify the Footer text and choose appropriate formats

For More Information

Click a topic to see step-by-step instructions for performing the following:

- Adding Titles to Results (on page 1194)

- Adding Tables to Results (on page 1195)

- Showing Results in Charts (on page 1197)

- Showing Results in Pivot Tables (on page 1210)

- Showing Results as Gauges Using Gauge View (on page 1220)

- Showing Filters Applied to Results (on page 1225)

- Adding Mark-up Text to Results (on page 1226)

- Adding Legends to Reports Using Legend View (on page 1228)

- Allowing Users to Change Columns in Reports (on page 1228)

Adding Titles to Results

Use the Title view to add a title, a subtitle, a logo or a link to a custom online help page, and timestamps to the results. Titles and subtitles can be formatted.

A Title view is always added to the results as the first view.

To work with a Title view

1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:

- To add a new title view, click the Add View button, and then select Title from the drop-down list.
- To edit an existing title view, find the title view, and click the Edit View button.

2 In the Title text box, enter the text to be displayed as the title.

If you do not specify a title, the name of the saved report is used as the title. For unsaved reports, the Title text box is blank.

3 If you do not want the saved name of the report to appear, deselect the Display Saved Name check box.

If the box is checked, the saved name is displayed below the text in the Title text box (if this text exists).

4 (Optional) If you want to display a logo image or other graphic, specify the appropriate path in the Logo text box.

The image is displayed to the left of the title text. The image or graphic should be accessible to all users who view this report.

5 (Optional) In the Subtitle text box, enter the text to be displayed as a subtitle.

The subtitle text will follow the actual title on a new line.

6 If you want to add additional formatting to the title or subtitle, perform the following:

a Click the edit buttons to the right of the Title and Subtitle dialog boxes.

b Make your choices for font, cell, and border options and then click OK.

NOTE: If you enter a new caption, it replaces the original title or subtitle.

7 If you want to display the report execution date or time, select one of the timestamp options from the Started Time drop-down list.

8 If you want to provide a link to customised help or other information related to the report, enter the appropriate URL in the Help URL text box.

The URL should be one that is accessible to all users who will view this report.

9 When you have finished, you can save the report with the Title view.

Adding Tables to Results

Use the Table view to show results in a standard table. Users can navigate and drill down in the results. You can add a grand total and column totals, specify custom table and column headings, and change the formula or aggregation rule for a column. You can also edit properties for a column to control the appearance and layout of a column and its contents, and specify formatting to be applied only if the contents of the column meet certain conditions.

You can also specify paging controls and the number of rows per page, display column and table headings, apply green bar styling and enable column sorting. If column sorting is selected, the column headers of the columns that can be sorted have a slightly raised visual appearance.

A Table view is always added to the results, as the second view.

The grand total for columns with the aggregation rule Average will differ in the Table and Pivot Table views. In the Table view, the grand total for a column with an Average aggregation rule is calculated from the database (as a sum divided by a count). In the Pivot Table view, the grand total is the average of the rows in the result set.

Grand totals do not take filters on metrics into account when aggregating the results. For example, you have a report with the Account Name column and the Number of Opportunities metric, with a filter on Number of Opportunities that is greater than or equal to 10. The grand total ignores the filter on the metric and instead aggregates all the opportunities.

NOTE: Changes made to the columns in the Table view (for example column format, column order, sort, formulas and so on) can be seen in the Define Criteria page, and changes in the Define Criteria page can be seen in the Table view.

To work with a Table view

1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:

- To add a new table view, click the Add View button, and select Table from the views drop-down list.

- To edit an existing table view, find the table, and then click the Edit View button for the table view.

The workspace shows the options and settings for the view.

2 To view the buttons for working with each column individually, select Header Toolbars with Results in the drop-down list to the right of Display.

3 To specify the sort order for one or more columns that appear in a report, click the Order By button for a column.

You can order results by more than one column. If you select more than one column, the order is shown on the Order By button. For more information about sorting, see Sorting and Reordering Columns (on page 1189).

4 To specify totals, perform the following actions:

■ To add a grand total, click the Grand Total button at the top, and make sure that the option Report-Based Total is selected. (Click the Grand Total button again to see the menu with this option.)

■ To add totals for an individual column, click the Total By button for that column, and make sure the option Report-Based Total is selected (click the Total By button again for the individual column, to see the menu with this option).

NOTE: The Total By button is only available for columns that can be *totalled by*. Typically this is a column that contains repeated values that would be summed for a total. Also, if the Report-Based Total option is not selected, the system calculates the total based on the entire result set, before applying any filters to the measures.

5 To add custom headings or edit the formula for a column, click the Edit Formula button.

The Edit Column Formula dialog box appears, where you can perform the following actions:

■ To specify custom headings, select the Custom Headings checkbox and enter new heading text into the appropriate location.

■ To edit the formula for the column, enter it into the Column Formula text box.

■ To change the aggregation rule for the column, make a selection from the Aggregation Rule drop-down list.

■ To combine multiple values or ranges of values from a given column into bins, click the Bins tab. Then add and name the bins.

All instances of the different values that make up the bin in the result set will be replaced by the bin name. Aggregations are performed accordingly as well.

6 To edit the properties for a column, or to specify formatting to apply if the contents of the column meet certain conditions, click the Column Properties button.

The Edit Column Format dialog box appears, where you can make your selections:

■ For information about formatting columns and adding conditional formatting, see Editing Column Properties (on page 1173).

7 When you have finished, you can save the report with the Table view.

To specify paging controls and the number of rows per page, display column and table headings, apply green bar styling, and enable column sorting

1 At the table view, click the Edit Table View Properties button near the top of the workspace.

2 Make your selections for the various options.

Showing Results in Charts

Use the Chart view to position columns on a chart and to customise the title, legend location, axis titles, data labels, size, and scale. You can select the chart graph, such as a line chart or a bar chart; the chart subtype, such as two-dimensional; and the style for columns, such as the shape and fill pattern. You can also set borders and colours and control other chart characteristics. Users can drill down on the results in the Chart view.

Chart graph choices include area charts, bar charts, bubble charts, line charts and other types. Chart subtypes include 2D, 3D, absolute, clustered, stacked, combination and custom.

This topic explains how to work with charts. It contains the following information:

- Chart Graphs for Oracle CRM On Demand Answers
- Chart View Buttons in Oracle CRM On Demand Answers
- Basic Chart Components

This topic also provides instructions for performing the following tasks:

- Adding or modifying chart views
- Specifying general properties for a chart view
- Controlling the display of grid lines in chart views
- Specifying the location of the legend on a chart view
- Setting colours for background, text, and borders in chart views
- Selecting the columns to display as axes in chart views
- Setting axis scaling options in chart views
- Editing scale markers in chart views
- Creating line scale markers
- Creating range scale markers
- Specifying advanced settings for range and line values
- Specifying axis titles and labels in chart views
- Specifying axis titles in chart views
- Specifying what happens when a user clicks a chart
- Formatting the appearance of a chart series
- Making selections for data labels in pie charts

NOTE: Oracle CRM On Demand Answers uses a third-party charting engine. The type of the chart, its size, and the number of elements charted can affect whether axes or legends are displayed. Whether axes or legends are displayed is constrained by the amount of available space on the Web browser page. Sometimes, by adjusting the width and height controls, you can make axes and legends appear in the chart.

Chart Graphs for Oracle CRM On Demand Answers

The following table shows the chart graphs available from the Graph drop-down list and describes their uses. Not all chart graphs are appropriate for all types of data. The default chart graph is a vertical bar chart.

Chart Graph Type	Description
Area	An area graph is similar to a line graph, but with the areas under the lines filled in. Area graphs show the percentage of the whole that each variable represents. Area graphs are useful for observing changes in cumulative value or percentage over time. For example, you can compare groups on certain measurements, such as outcome, and display group trends.
Horizontal Bar	Use a horizontal bar graph to compare facts by showing bars in a horizontal direction. Horizontal bar graphs are useful for comparing differences among similar items. For example, you can compare competing product sales, same product sales during different periods or the same product sales in different markets.
Bubble	A bubble graph is a variation of a scatter graph that displays data elements as circles (bubbles). It shows three variables in two dimensions. One value is represented by the location of the circle on the x-axis. Another value is represented by the location of the circle on the y-axis. The third value is represented by the relative size of its circle. Bubble graphs are useful for plotting data with three variables and for displaying financial data during a period. TIP: To create a bubble graph, plot one fact on the x-axis, another fact on the y-axis, and a third fact on the bubble radius axis. These three facts are plotted for selections on the Level axis.
Vertical Bar	A vertical bar graph compares facts using vertical columns. Vertical bar graphs are useful for comparing differences among similar items.
Line	A line graph can be used to plot multiple facts. Line graphs are useful for showing patterns and trends in data.
Line Bar Combo	A line bar combination graph plots two sets of data with different ranges: one set as bars, and one set as lines overlaid on the bars. Line bar combination charts are useful for showing trend relationships between data sets. TIP: You can specify any mix of bars and columns, but there must be one of each. You can specify all columns as lines, but if you want only bars, use a bar chart. (When only bars are selected for this chart type, some column selections might be drawn as lines.)

Chart Graph Type	Description
Pareto	A Pareto graph is a form of bar chart and line chart that displays criteria in descending order. In this graph type, the line shows a cumulative total of the percentages. Pareto graphs are useful for identifying significant elements, such as best and worst or most and least.
Pie	A pie graph shows data sets as percentages of a whole. Pie graphs are useful for comparing parts of a whole, such as sales by region or by district.
Radar	A radar graph plots the same information as a bar graph, but instead displays data radiating from the centre of the graph. Each data element has its own value axis. Radar graphs are useful for examining the overlap and distribution of data.
Scatter	A scatter graph displays x-y values as discrete points, scattered within an x-y grid. It plots data points based on two independent variables. A scatter graph allows you to plot large numbers of data points and observe the clustering of data points. Scatter graphs are useful for observing relationships and trends in large data sets. **TIP:** To create a scatter graph, plot one fact on the x-axis, and plot another fact on the y-axis. These facts are plotted for selections on the Level axis.
Step	A step graph is similar to a line graph. It can also be used to plot multiple facts.

Your selection for the chart graph determines the chart subtypes that are available from the Type drop-down list. Not all chart types have subtypes; for example, bubble and radar graphs have no subtypes. Chart subtypes default to the 3D option, if available. Depending on the chart type selection, subtype options might include the following:

- Area charts: 3D and 2D

- Bar charts: 3D, 2D, 3D Stacked and 2D Stacked

- Line charts: 3D and 2D

- Pareto charts: 3D and 2D

- Pie charts: 3D and 2D

- Scatter charts: Scatter, and Scatter with Lines

- Step charts: 3D and 2D

Your selection for the chart type also determines the styles that are available from the Style drop-down list. Not all chart types have styles. The style defaults to solid fill, if available. Depending on the chart type selection, styles for charts might include the following:

- Area charts: Solid Fill and Pattern Fill

- Bar charts: Rectangle, Cylinder, Gradient, Triangle, Diamond, Pattern Fill

- Line charts: Rectangle, Cylinder, Gradient, Triangle, Diamond, Pattern Fill

- Pareto charts: Rectangle, Cylinder, Gradient, Triangle, Diamond, Pattern Fill

- Pie charts: Solid Fill and Pattern Fill

Chart View Buttons in Oracle CRM On Demand Answers

The buttons at the top of the Chart View page provide access to various chart settings. The following table describes the Chart view buttons and settings.

Chart View Button	Description
	General Chart Properties. Sets general properties for the chart, such as its title, whether data labels appear and the chart size.
	Axis Titles and Labels. Controls the display of the axis title and data labels at the bottom of the chart and to the left of the chart.
	Axis Scaling. Sets the axis scaling properties, the number of tick marks and the scale type.
	Additional Charting Options. Controls the additional charting options, such as the following: - The display of grid lines on the chart - The location of the legend, and it provides options for resizing the legend - Background, text, and border colours - How users interact with the chart when they click it, such as drilling down to lower-level data, or navigating automatically to a related saved report or a Web site
	Format Chart Data. Allows you to format the appearance of a chart series, such as colour, line width, and line symbols.
	Advanced Properties. For pie charts, allows you to make selections for data labels.

Basic Chart Components

You can define the basic components for a chart. The following table describes the components you can customise.

NOTE: Some components are available only for specific chart types. For example, a pie chart does not have axes. The type of chart you select determines which components are available.

Chart Component	Description
Measure labels	Controls the position and formatting of the column heading for the data in the Measures section. It also provides totalling and ordering capabilities. If there is only one measure, you can exclude this element.
Legend	Use the legend to explain the chart. You can specify a location for the legend, and if it can be shortened.
Axes	The horizontal and vertical lines that identify the scale of the chart. You can specify horizontal and vertical axes for the chart.
Grid Lines	A matrix of horizontal and vertical lines that helps you to relate any point on a chart to the axes. You can specify the colours for grid lines.
Scale Markers	Identifies the scale of the chart. You can specify properties, such as location, size, colour, line width and range.
Drill	Displays more detail. You can specify if and how a user can drill down to access further details about the information presented in the chart.
Title	Specifies a title to describe the chart.
Axis title, labels and limit	Specifies if and how you want titles and scale labels to appear on the axes of your chart.
Chart series	Formats elements of the appearance of a chart series, such as the colour, line width, and line symbols. You can also apply rule-based formatting, such as applying a certain colour when a position of the series is equal to a specified value.
Tick Marks	Subdivides the scale markers on an axis, to enhance detail.
Data Labels	Shows the numeric value of data as you pause the mouse over the chart.

Adding or Modifying Chart Views

The following procedure provides the basic steps to add or modify a chart view.

NOTE: If you select a chart graph that is incompatible with the results, no results are shown.

To add or modify a chart view

1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:

- To add a new chart view, click Add View, and then select Chart.

- To edit an existing chart view, click the Edit View button for the chart view.

The workspace shows the options and settings for the view.

2 Make your selections in the chart Graph, Type, and Style fields.

Your selection in the Graph field, such as Pie or Line, determines the available choices for the Type and Style. For some graphs, only a default subtype or style is available.

As you make selections from the drop-down lists, the Chart view changes to reflect your selections.

TIP: You can add columns to the chart while you are in the Chart View page, by clicking the name of the field for each column in the Active Subject Area. Alternatively, you can navigate to the Define Criteria page to add additional columns. Any columns that you add in the Chart View page are added to the report overall; you can see columns in the Define Criteria page and also in other views, as well as in the Chart View page. To delete a column from the chart, you must navigate to the Define Criteria page, and click the Remove Column button for the column.

3 Use the buttons at the top of the Chart View page to specify additional chart settings.

4 To see the effects of your changes, click Redraw.

You can click Redraw at any time to refresh the Chart view.

5 To remove changes and start from the original chart, click Restore Default.

6 To resize the chart, use the vertical and horizontal slide bars.

7 Save the report.

Specifying General Chart Properties in Chart Views

You can set general properties for the chart, such as a title and the appearance of data labels.

Data labels are enabled by default for selected 2D chart types.

The default setting for the chart size is to scale all elements of the existing chart, including height and width, to fit the available space. The height and width of the chart remain proportional to each other when the size of the chart changes. The chart automatically resizes the chart elements. The revised size is based on the space available within the chart. You can specify a fixed size for the chart in the General Chart Properties dialog box. The fixed size overrides the default size.

NOTE: The chart can expand significantly if the number of items being charted grows substantially.

For example, suppose you create a report to display the sales of three products, create a chart of the results with the product sales shown as three columns, and adjust the size of the chart so that it occupies about 25 percent of the page. If the report is run later and six products are returned, the chart is expanded to twice its original width, or about 50 percent of the page, so that the widths of the individual columns in the chart remain constant.

The chart elements are resized as required to fit in the chart. Using the preceding example, the chart continues to occupy about 25 percent of the page, and the columns are resized to fit in the available space.

To specify general properties for a chart view

1   Click the following button at the top of the Chart View page to open the General Chart Properties dialog box:

2   In the General Chart Properties dialog box, make your selections, and click OK.

The chart view refreshes. The chart might resize to accommodate your selections.

Controlling the Display of Grid Lines in Chart Views

You can control whether grid lines display on the chart, and specify grid line colours.

To control the display of grid lines on a chart view

1   Click the following button at the top of the Chart View page to open the Additional Charting Options dialog box:

2   In the Additional Charting Options dialog box, click the Grid Lines tab, make your selections, and click OK.

The chart view refreshes.

Specifying the Location of the Legend in Chart View

You can specify the location of the legend, and set the options for resizing the legend.

To specify the location of the legend on a chart view

1   Click the following button at the top of the Chart View page to open the Additional Charting Options dialog box:

2   In the Additional Charting Options dialog box, click the Legends tab, make your selections, and click OK.

The chart view refreshes. The chart might resize to accommodate your selections.

Setting Colours for the Background, Text, and Borders in Chart View

You can specify the colour for the chart background, text, and borders.

To specify the background, text, and border colours in a chart view

1 Click the following button at the top of the Chart View page to open the Additional Charting Options dialog box:

2 In the Additional Charting Options dialog box, click the Borders & Colours tab, make your selections, and click OK.

The chart view refreshes.

Selecting the Columns to Display as Axes in Chart View

You can select which columns appear in the chart and which axes represent those columns. Oracle CRM On Demand Answers displays a matrix of the appropriate options. The left edge of the matrix lists the columns, and the top edge lists the axes types available for the chart type you are using. You can also indicate whether measure labels appear for factual data plotted on an axis.

The available axes change depending on the type of chart selected from the Graph drop-down list. The chart axis buttons used in chart view are described in the following table.

Chart Axis Button	Axis

Chart Axis Button	Axis
	Sets the selected column as a level axis, which is for scatter and bubble graphs.
	Sets the selected column as the horizontal axis.
	Sets the selected column as the vertical axis. For a radar graph, this is the fact axis.
	Indicates if the selected column's values should appear in the chart legend
	Sets the selected column as an overlay axis. This is for a line bar combo graph.
	Sets the selected column as the radius axis. This is for a bubble graph.
	Sets the selected column as a pie values axis. For a radar graph, this is the radar axis.

To select the columns to be displayed as the axes on a chart view

1 In the columns area to the left of the chart, click the appropriate checkbox for one of the axis buttons to display that column as the corresponding axis in the chart.

The axis buttons change depending on the type of graph selected from the Graph drop-down list.

2 To add a column to the chart, click the column in the selection area, and then set it as an axis.

This is equivalent to adding the column to the report on the Define Criteria page.

3 Click Redraw to refresh the chart view.

Specifying Axis Scaling Options in Chart View

You can control the axis limits, tick marks, and scale type, and the properties of scale markers.

To specify axis scaling options for a chart view

1   Click the following button at the top of the Chart View page to open the Axis Scaling dialog box:

2   In the Axis Scaling dialog box, make your selections, and click OK.

For charts with numeric axes, the settings of the axis scaling options determine how the scale is selected:

■   When you select Default, Oracle CRM On Demand Answers selects the scale and sets the axis to zero (0) for positive numbers.

■   When you select Zoom to Data Range, Oracle CRM On Demand Answers selects the scale. It evaluates the range of values on the axis and selects the appropriate minimum and maximum values for the scale. This feature is useful when charting a set of large values that are all within a small percentage of each other. The chart zooms in on the values so differences are more easily distinguished.

■   You can also manually set the axis scaling values to specific numbers.

The chart view refreshes. The chart might resize to accommodate your selections.

Editing Scale Markers in Chart View

Scale markers are accenting lines or shaded background ranges that mark key points, thresholds, ranges and so on. The lines or ranges can be applied to one or more axes, depending upon the type of chart. Lines appear in front of the chart information, whereas ranges appear in the background.

NOTE: Some chart types, such as pie charts, do not use scale markers.

The following procedure provides the general steps to edit a scale marker.

To edit scale markers for a chart view

1   Click the following button at the top of the Chart View page to open the Axis Scaling dialog box:

2   In the Axis Scaling dialog box, click Edit Scale Markers.

3   In the Scale Markers dialog box, click Add to add the first scale marker, and make your selections for the marker.

Advanced options include setting the scale to a static value, a particular column name or as the result of an SQL query. For more information about the types of scale markers and using the advanced options, see the procedures below.

4   Click OK successively to close the dialog boxes.

The chart view refreshes. The chart might resize to accommodate your selections.

To create a line scale marker

1   In the Scale Markers dialog box, in the Type field, select Line.

2   Enter a line width in the third column.

    This value is the thickness of the line, in pixels.

3   Enter the position for the line in the fourth column.

    The position indicates where the line will be located on the axis. For example, if your left axis has values from 0 to 100, and you specify a position of 40, you see a horizontal line intersecting the 40 position on the vertical axis.

4   Enter the colour for the line.

5   Enter a caption for the line.

    The caption appears when a user pauses the mouse over the line in the chart and in the legend.

6   Click OK.

To create a range scale marker

1   In the Scale Markers dialog box, in the Type field, select Range.

2   Enter the low end of the range in the third column.

3   Enter the high value of the range in the fourth column.

    NOTE: You must specify values that appear on the same axis as the range. For example, if your left axis has values from 0 to 100, and you specify 20 for low and 40 for high, the graph background appears in the colour that you specify for the range between those values.

4   Enter the colour for the range.

5   Enter a caption for the range.

    The caption appears in the legend.

6   Click OK.

Specifying Advanced Settings for Range and Line Values

The options for these values include: a static value, a value sourced from a column included in the report, or one derived from an SQL query.

To specify an advanced setting

1   Click the Properties button beside the field where you want to specify the advanced option.

2 Select one of the following options.

- **Static Value.** Enter a numeric increment.

- **Variable Expression.** This option is based on the results of a session and its presentation variables. This option is limited because most session or presentation variables might not be related to values on the chart.

- **Column Name.** Choose a column on which to base the increment.

- **SQL Query.** This option is based on the results of an SQL query. The results might be a table, but only the first row and first column cell value is applied.

3 Click OK.

Specifying Axis Titles and Labels in Chart View

You can specify the following for a chart view:

- Whether the axis titles and data labels display at the bottom and to the left of the chart

- Whether the labels are rotated to fit better in the chart

- The maximum label length

- The text for the label if it is different from the default text

NOTE: Adjusting the size of a chart can affect how the axis labels appear.

To specify an axis title on a chart view

1 Click the following button at the top of the Chart View page to open the Axis Titles and Labels dialog box:

2 In the Axis Titles and Labels dialog box, make your selections, and click OK.

The chart view refreshes.

NOTE: When you set the Limit label length, specify the total number of characters that a label can contain. Ellipsis points (…) appear where any additional characters have been removed.

Specifying What Happens When a User Clicks a Chart

When a user views the chart, you can specify the type of interaction that will occur if the user clicks the chart. The following are the types of interaction for a chart:

- **Drill.** Allows the user to drill down to more detailed information. This is the default interaction if a path for the drilldown is automatically configured. If no path for the drilldown is initially available, use Navigate to configure a customised path.

- **Navigate.** Allows the user to navigate to another saved report or dashboard.

■ **None.** Disables drilling down or navigation from the chart.

To specify what happens when a user clicks a chart

1 Click the following button at the top of the Chart View page to open the Additional Charting Options dialog box:

2 In the Additional Charting Options dialog box, click the Interaction tab, and make your selection for the interaction.

3 Click OK.

Formatting the Appearance of a Chart Series

Formatting a chart series allows users to customise individual series components. The formatting is based on their position. Users can format the appearance of a chart series, such as the colour, line width, and line symbols.

For example, on a line bar combination chart with two data series, assume that the bar is position 1 and the line is position 2. Users can change the colour of the bar, the width of the line, and the symbol representing the data points. Users can also apply rule-based formatting, such as applying a certain colour when a position of the series is equal to a specified value.

To format the appearance of a chart series

1 Click the following button at the top of the Chart View page to open the Series Format Control dialog box:

2 In the Series Format Control dialog box, make your selections.

The choices available in the Series Format Control dialog box depend upon the chart type. For example, to do the following:

■ To customise a series, deselect the Use Default check box.

■ To restore a series to its default settings, select the Use Default check box again.

■ To add a new format series control, click the Add button. Even if the current chart does not use this series, it will be used if it is needed (such as for drilling).

■ To return all series to their default values, click the Clear All button.

■ To change colours, click the colour box to access the Colour Selector dialog box.

■ To change other series attributes, click the appropriate tab, and select the bar or line attributes.

3   Click OK.

Making Selections for Data Labels in Pie Charts

Data labels appear when a user pauses the mouse over elements in the pie chart. You can specify how values appear and what the data labels display. You can show values as percentages of the total or as actual values. Data labels can display the value only, the name only, or both the value and name.

Depending on your selection, the chart might resize to allow the data labels to appear.

To make selections for data labels in pie charts

1   Click the following button at the top of the Chart View page to open the Chart Type Special dialog box:

2   In the Chart Type Special dialog box, make your selections for the value and the data label. Then click OK.

Showing Results in Pivot Tables

The Pivot Table view is an interactive view that allows you to rotate the rows, columns and section headings to obtain different perspectives of the data. Pivot tables are navigable and drillable, and are especially useful for trend reports.

This topic describes the pivot table positions and provides instructions for performing the following tasks:

- Adding or modifying pivot table views
- Using Multiple page drop-down lists in pivot tables
- Overriding the default aggregation rules in pivot tables
- Adding formatting to pivot tables
- Displaying running sums in pivot tables
- Showing items as relative values in pivot tables
- Using calculations in pivot tables
- Building calculations in pivot tables

Pivot Table Positions

When you add or modify a pivot table, the columns included in the report appear as elements in the pivot table template.

The following table describes the pivot table positions.

Position	Description

Position	Description
Pages	Provides an interactive result set that allows users to select the data that they want to view. The values from the columns that appear in the Pages position are used as the initial filter criteria. The values appear in a drop-down list for selection. Based on this selection, a pivot table (composed of the Sections, Columns, Rows and Measures defined in the pivot table) appears.
Sections	Provides initial filter criteria. For each value in the Section column, a unique pivot table appears, composed of the Columns, Rows and Measures defined in the pivot table.
Columns	Shows an element in a column orientation. Pivot tables can contain multiple columns.
Rows	Shows an element in a row orientation. Like columns, pivot tables can contain multiple rows.
Measures	Populates the section of a pivot table that contains summary data. The elements in the Measures area are summarised based on the elements in the page, section, row, and column fields. Each value in the Measures elements represents a summary of data from the intersection of the source rows and columns.
	The Measure Labels element, which appears in the Columns area by default, controls the position and formatting of the column heading for the data in the Measures section. It also provides totalling and ordering capabilities. If there is only one measure, this element can be excluded.
Excluded	Excludes columns from the pivot table results. Any column that is added as criteria for the report after the pivot table has been created is added as excluded.

Adding or Modifying Pivot Table Views

The following procedure provides the basic steps to add or modify a Pivot Table view.

To add or modify a Pivot Table view

1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:

- To add a new pivot table view, click Add View, and then select Pivot Table.

- To edit an existing pivot table view, click the Edit View button for the pivot table view.

The workspace shows the options and settings for the view.

2 To view the pivot table template and buttons for working with each column individually, select the Show Controls checkbox.

The workspace shows the pivot table template.

3 Drag and drop the report columns, which appear as elements in the pivot table, to the desired positions in the pivot table template.

4 To see a preview, select the Display Results checkbox.

You can click the Display Results link to refresh the results.

5 To add a Chart view next to the pivot table, select the Chart Pivoted Results checkbox.

For information about the Chart view, see Showing Results in Charts (on page 1197).

6 To change the location of the chart relative to the pivot table, select the location from the Chart Position list.

You can also choose to see the chart only and hide the table by selecting Chart Only from the list.

7 To sort the results, click the Order By button for the column on which you want to sort.

The button changes to indicate the sort order:

■ An up arrow indicates ascending sequence.

■ A down arrow indicates descending sequence.

For more information about sorting, see Sorting and Reordering Columns (on page 1189).

8 To add totals, perform the following actions:

a For totals in the Pages, Sections, Rows and Columns areas, click the Totals button and make a selection:

■ For no totals, select None. The Totals button appears with a white background (default).

■ To show the total before or after the data items, select Before or After. For example, if you add a total on a row containing regions and specify the Before option, the total is shown before individual districts in the region are listed.

b For totals in the Measures area, click the More Options button for the row or column to be totalled, select Aggregation Rule, select a value, and make sure the option Report-Based Total is selected.

NOTE: If the option Report-Based Total is not selected, Oracle CRM On Demand Answers calculates the total based on the entire result set, before applying any filters to the measures.

Depending on the position of this element, the totals for the summary data represented by the Measures elements display as a column or row. Column and row totals include labels.

When the Totals button is dimmed, no totals will appear.

9 To work with additional options for a column, measure or row, click the More Options button and make a selection from the drop-down list.

10 To format labels or values for a column, click the Totals button or the More Options button and then select the appropriate format option.

11 Save the report.

Using Multiple Page Drop-Down Lists in Pivot Tables

When you place multiple attributes in the Pages area in the pivot table, you can create a multiple drop-down list page. Then, when users view the pivot table, they see a drop-down list for each attribute, rather than a concatenated list of attributes placed in the page heading (the default).

For example, if you place Region and Brand in the pages area, a Region drop-down list allows the user to select a particular region, and see the data for that region only, rather than seeing Region concatenated with Brand.

To create an independent drop-down list in an Oracle CRM On Demand Answers pivot table

1 Drag and drop your target attributes into the Pages area.

2 Click the More Options button on the second (or any subsequent) attribute in the Pages layout area.

3 Select the option Start New Page Drop Down.

The drop-down list for the attribute appears above the preview of the pivot table.

You can create drop-down lists for other attributes in the Pages area. When the report is saved, the drop-down lists will be available to users with access to the report.

Overriding Default Aggregation Rules in Pivot Tables

You can override the default aggregation rule for a measure, which is specified by either the original author of the report or by the system.

To override the default aggregation rule for a measure in a pivot table

1 Click the More Options button for the measure whose default aggregation rule you want to override.

2 Select the option Aggregation Rule, and then select the aggregation rule to apply.

Adding Formatting in Pivot Tables

You can apply green bar styling and cosmetic formatting to a pivot table. You can also customise the appearance of sections, rows, columns, measures, and the content that they contain.

For example, you can specify font, cell, border, and style sheet options for sections, values, and measure labels. For sections, you can include and customise the position of column headings together with the values in that section. You can also insert page breaks, so that every time a value changes in the section, the new section appears on a new page.

You can also add conditional formatting, which helps direct attention to a data element if it meets a certain threshold. To add conditional formatting to a column in a pivot table, see Editing Column Properties (on page 1173).

Adding Green Bar Styling and Cosmetic Formatting to a Pivot Table

Green bar styling shows alternating rows or columns in a light green colour. Cosmetic formatting affects the overall appearance of the pivot table and also allows you to change the default green bar colour.

To add green bar styling and cosmetic formatting to a pivot table

1   In the pivot table view, click the Pivot Table View Properties button near the top of the workspace.

2   To add green bar styling, select the Enable Alternating Row Green Bar Styling check box.

    To change the way the styling is applied, make a selection from the Alternate list.

3   To add cosmetic formatting, click the Set Alternate Format button.

4   In the Edit Format dialog box, to change the default green bar colour, select a new background colour for the cell format.

    For more information about cosmetic formatting, see Changing the Appearance of Reports (on page 1158).

Adding Formatting for Sections and Section Content

Section and content formatting options allow you to do the following:

■   Include and customise the position of column headings together with the values in that section.

■   Insert page breaks. Every time a value changes in the section, that new section will appear on a new page. This is useful for data-driven detail reports.

■   Apply cosmetic formatting to a section and its content.

To add formatting for sections in a pivot table

1   To format the appearance of a section, do the following:

    a   In the pivot table view, click the Section Properties button.

    b   In the Section Properties dialog box, make your selections, and click OK.

2   To format the appearance of the section content, do the following:

    a   Click the Content Properties button.

    b   In the Content Properties dialog box, make your selections and click OK.

    For information about applying cosmetic formatting, see Changing the Appearance of Reports (on page 1158).

Adding Formatting for Rows

Row and row content formatting options allow you to perform the following:

■ Apply cosmetic formatting to rows, row headings and row values.

■ Use a row in pivot table calculations but suppress its display in results.

■ Define a new calculated item for use in a pivot table.

■ Duplicate the row in the pivot table.

■ Remove a column from the pivot table view.

To add formatting for rows

■ In the pivot table view, click the More Options button for the row and make a selection from the drop-down list:

■ To apply cosmetic formatting to row headings or values, select the appropriate option.

■ For information about applying cosmetic formatting, see Changing the Appearance of Reports (on page 1158).

■ To hide a row from the output, select Hidden.

■ To define a new calculated item, click New Calculated Item.

For more information on defining calculated items, see the Building Calculations in Pivot Tables section of this topic.

■ To duplicate the row in the pivot table, select Duplicate Layer.

■ To remove the column from the report, select Remove Column.

■ The column is removed from the pivot table and all other result views for the report.

NOTE: The Data Format settings for columns included in the Measures area inherit the settings for columns in the section.

Displaying Running Sums in Pivot Tables

Numeric measures in a pivot table can be displayed as running sums, where each consecutive cell for the measure displays the total of all previous cells for that measure. This option is a display feature only and has no effect on actual pivot table results.

Typically, running sums would be displayed for duplicated columns or for measures for which the option to show data as a percentage of the column has been selected, with the last value being 100 percent. Running sums apply to all totals. The running sum for each level of detail is computed separately.

Column headings are not affected when the running sum option is selected. You can format the column heading if you want it to indicate that the running sum option is in effect.

The following usage rules are in effect for running sums:

■ A running sum is incompatible with the SQL RSUM function (the effect would be a running sum of the running sum).

- All running sums are reset with each new section. A running sum does not reset at a break within a section or continue across sections.

- If a measure does not display in a single column or in a single row, the measure is summed left to right and then top to bottom. (The lower right cell will contain the grand total.) A running sum does not reset with each row or column.

- Rolling minimums, maximums and averages are not supported.

To display a measure as a running sum

- In the Measures area, click the More Options button for the row or column to be summed and select the following option:

  Display as running sum

Showing an Item's Relative Value in Pivot Tables

You can dynamically convert a stored or calculated measure on a pivot table to a percentage or an index. This shows the relative value of the item, compared to the total, without having to explicitly create a calculation for it.

For example, if you are using a pivot table to examine sales by region, you can duplicate the sales measure and view it as a percentage of the total. This allows you to see the actual sales, and the percentage of sales, that each region accounts for.

You can view the measure as a percentage between 0.00 and 100.00, or as an index between 0 and 1. You are free to decide which method you use.

To show an item as a relative value in a pivot table

1   In the pivot table view, click the More Options button to make the column show as a relative value.

    The following step is optional. When you duplicate the measure in the pivot table, you can display both the total for the measure and its relative value. This eliminates the need to add the column twice on the Define Criteria page to display the total and its relative value in the pivot table.

2   To duplicate the measure, choose Duplicate Layer.

    The measure appears a second time in the pivot table, with the same name. To rename the measure, click More Options and choose Format Headings, then enter the new name in the first field.

3   Click More Options and choose Show Data As, choose either Percent of or Index of, and then choose the appropriate submenu option.

    NOTE: The option Show Data As is only available for items that are stored or calculated measures.

    The options for Percent of and Index of are:

    - Column

    - Row

    - Section

- Page

- Column Parent

- Row Parent

- Layer (If you choose layer, then you must also choose a column in the report by which to group the percentages.)

Using Calculations in Pivot Tables

You can use calculations in a pivot table to obtain different views of the data. The calculations allow you to override the default aggregation rule specified in the system, and for an existing report, the aggregation rule chosen by the author.

The following table describes the calculations that you can use in pivot tables.

Calculation	Description
Default	Applies the default aggregation rule as defined in the Oracle CRM On Demand Answers repository or by the original author of the report.
Sum	Calculates the sum obtained by adding up all values in the result set. Use this for items that have numeric values.
Min	Calculates the minimum value (lowest numeric value) of the rows in the result set. Use this for items that have numeric values.
Max	Calculates the maximum value (highest numeric value) of the rows in the result set. Use this for items that have numeric values.
Average	Calculates the average (mean) value of an item in the result set. Use this for items that have numeric values. Averages in pivot tables are rounded to the nearest whole number.
First	In the result set, selects the first occurrence of the item.
Last	Selects the last occurrence of the item in the result set.
Count	Calculates the number of rows in the result set that have a non-null value for the item. The item is typically a column name, in which case the number of rows with non-null values for that column are returned.
Count Distinct	Adds distinct processing to the Count function. This means that each distinct occurrence of the item is only counted once.
Formula	Opens a toolbar that lets you select mathematical operators to be included in the calculation.
Server Complex Aggregate	This setting forces the aggregation rule to be determined and calculated by the Analytics Server, rather than the Pivot table. It issues an 'AGGREGATE(x by y)' statement which the Analytics server interprets to mean: use the most appropriate aggregation rule for measure 'x' to get it to level 'y'.

Calculation	Description
None	No calculation is applied.

For more information about SQL functions, see Using Functions in Analyses (on page 1245).

Building Calculations in Pivot Tables

You can build calculations for items in the Pages, Sections, Rows and Columns areas.

To build a calculation for an item in a pivot table

1 In the Sections or Rows area, click the More Options button for the measure on which you want a calculation performed.

2 Select the option New Calculated Item.

The Calculated Item window appears.

3 Assign a name for the calculation in the Name field.

4 To build a calculation other than a formula, select from the following options:

■ To build one calculation, select the function that you want to work with from the Function drop-down list, and click on one or more items in the Values list to add them to the Function field.

■ To build multiple calculations for multiple items, type the functions and click on the item names to add them to the Function field.

■ If you are averaging a column with a type of integer, change the formula for the column to cast it to a double (floating point) type. For example, if the current formula is x, change it to CAST(x as double).

NOTE: Averages on pivot tables are rounded to the nearest whole number.

5 To build a formula, select the Formula function.

NOTE: A formula creates a dynamic custom grouping within the pivot table. All measures referenced in a formula must be from the same logical column and must be present in the results. Formulas can be inserted in, or combined with, other calculations.

The mathematical operators become visible. The operators are shown in the following table.

Operator	Description
+	Plus sign, for an addition operation in the formula.
-	Minus sign, for a subtraction operation in the formula.
*	Multiply sign, for a multiplication operation in the formula.
/	Divide By sign, for a division operation in the formula.
$	UK pound sign, to be applied to the row position of an item in a formula.

Operator	Description
(	Open parenthesis, to signify the beginning of a group operation in the formula.
)	Close parenthesis, to signify the ending of a group operation in a formula.

a In the Function field, build the formula by typing or clicking measure names and clicking operators to insert them in the formula.

b Use parentheses, where appropriate.

6 When the calculation is complete, click Finished.

If any errors are detected, a message will appear. Correct the error and click Finished again.

Examples of Calculations in Pivot Tables

The examples and explanations in this section assume that you have a basic understanding of SQL and its syntax. The examples are hypothetical. Not all possible calculations are shown.

Example 1. This example obtains the value of the current measure, such as UK pound sales, for each of the products SoftDrinkA, SoftDrinkB and SoftDrinkC, and adds the values together.

    sum('SoftDrinkA', 'SoftDrinkB', 'SoftDrinkC')

This is equivalent to selecting Sum from the Function drop-down list, and then typing or clicking 'SoftDrinkA','SoftDrinkB','SoftDrinkC' to add them to the Function field.

Example 2. This example obtains the minimum current measure, such as UK pounds in sales, for SoftDrinkA or SoftDrinkB, whichever is lower.

    min('SoftDrinkA', 'SoftDrinkB')

In Example 1 and Example 2, each functional calculation is performed for each item in the outer layer, such as the Product layer. For example, if Year and Product are laid out on an axis, and one of the preceding calculations is built on the Product layer, the results will be computed per year.

Example 3. This example obtains the values for each item in the outer layer, such as Year and Product, and adds them together.

    sum(*)

Example 4. This example obtains the current measure, such as UK pound sales, of the item from the first, second and third rows, and totals them.

    sum($1, $2, $3)

Instead of specifying a named item, such as SoftDrinkA, you can specify $n or $-n, where n is an integer that indicates the item&rsquo;s row position. If you specify $n, the measure is taken from the nth row. If you specify $-n, the measure is taken from the nth to the last row.

For example, for UK pound sales, $1 obtains the measure from the first row in the data set, and $-1 obtains the measure from the last row in the data set.

Example 5. This example adds sales of SoftDrinkA, SoftDrinkB and SoftDrinkC.

    'SoftDrinkA' + 'SoftDrinkB' + 'SoftDrinkC'

This is equivalent to the following calculation:

    sum('SoftDrinkA','SoftDrinkB','SoftDrinkC')

Example 6. This example adds sales of SoftDrinkA with sales of diet SoftDrinkA, then adds sales of SoftDrinkB with sales of diet SoftDrinkB, and then returns the maximum of these two amounts.

    max('SoftDrinkA' + 'diet SoftDrinkA', 'SoftDrinkB' + 'diet SoftDrinkB')

Showing Results as Gauges Using Gauge View

Use the gauge view to show results in gauges. Gauges are useful for showing performance against goals. Supported gauge types include dial, bar, and bulb-style gauges.

You can select the type of gauge and customise its appearance, including the title, the ranges to show, how many gauges to display in a row, and other characteristics such as gauge width and dial and indicator needle size. You can also set thresholds, borders and colours, and control other gauge characteristics.

Gauges are navigable. When a user clicks it, you can direct the user to another saved report.

This topic describes the gauges and gauge view settings. It also provides instructions for performing the following tasks:

- Adding or modifying gauge views in Oracle CRM On Demand Answers

- Setting the general background properties in a gauge view

- Adding titles and footers to a gauge view

- Adding gauge ranges to a gauge view

- Specifying additional properties in gauge views

- Setting the advanced properties for dials in dial gauges

Gauges in Oracle CRM On Demand Answers

This section describes gauge types, subtypes, and sizes.

Gauge Types

The following table shows the gauges available from the Gauge drop-down list and describes their uses. The default gauge is a dial gauge.

Gauge Type	Description
Dial	A dial gauge shows data using a dial with one or more indicator needles that change position to indicate where the data falls within predefined limits.
Bar	A bar gauge shows data using a single bar that changes colour to indicate whether the data is within predefined limits.

Gauge Type	Description
Bulb	A bulb gauge shows data using a circle that changes colour to indicate whether the data is within predefined limits. An array of bulb gauges is particularly useful for scorecard-type output.

Gauge Subtypes

Your selection for the gauge type determines the gauge subtypes that are available from the Type drop-down list. The dial gauge has no subtype. Gauge subtypes include the following:

■ Bar gauges: Filled and LED-style. The default subtype is filled.

■ Bulb gauges: 3-dimensional (3D) and 2-dimensional (2D). The default subtype is 3D.

Gauge Sizes

Gauge sizes include small, medium, large, and custom. The default size is medium.

Gauge View Settings in Oracle CRM On Demand Answers

The buttons at the top of the gauge view page provide access to various gauge settings. The following table describes the gauge view buttons and settings.

Gauge View Button	Description
	Gauge Canvas Properties. Allows you to set the general properties for the background on which the gauge appears.
	Gauge Titles. Allows you to specify a title, a subtitle, a footer, and a secondary footer for the gauge.
	Gauge Ranges. Allows you to specify the ranges that can be represented in the gauge.
	Additional Gauge Properties. Allows you to specify additional gauge properties, including control over the appearance of elements within the gauge, setting properties for gauge limits and tick marks, and specifying the interaction to occur when a user clicks the gauge.
	Advanced Properties. Allows you to set the advanced properties for the dial in a dial gauge, including how scale labels are displayed, and the arc length and thickness of the dial.

Adding or Modifying Gauge Views in Oracle CRM On Demand Answers

The following procedure provides the basic steps to add or modify a gauge view.

NOTE: If you select a gauge type that is incompatible with the results, no results are shown.

To add or modify a gauge view in Oracle CRM On Demand Answers

1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:

■ To add a new gauge view, click Add View, and then select Gauge.

■ To edit an existing gauge view, click the Edit View button for the gauge view.

The workspace shows the options and settings for the view.

2 Make your selections in the Gauge, Type, and Size fields.

3 For all gauge types, use the Measures drop-down list to select the measure to gauge.

4 For dial gauges:

   a Use the Marker Type drop-down list to select the indicator needle to use, such as a compass, arrow, or line.

   b To select a colour for the indicator needle, click the Colour field and make a selection.

   c To add another indicator needle, click Add Marker.

5 Use the buttons at the top of the gauge view page to specify additional gauge settings.

6 To remove changes and start from the default gauge view, click Restore Default.

7 Save the report.

Specifying General Gauge Background Properties in a Gauge View

You can set general properties for the background on which the gauge appears, such as whether to display a title and whether a legend appears with each gauge. You can also specify a background colour, a colour for the title, whether to show a border around the background, the number of gauges to show per row, and the space between them.

To set general background properties for a gauge view

1 Click the Gauge Canvas Properties button at the top of the gauge view page.

2 In the Gauge Canvas Properties dialog box, make your selection for a title, as follows:

■ To show the name of the measure, do not select the Override Default check box, and leave the title text field empty.

■ To show a different title, select the Override Default check box, and enter the title text.

■ If you do not want a title to appear on the background, select the Override Default check box, and leave the title text field empty.

3 For the legend, make a selection from the list, or, if you want to suppress the display of the legend, select None.

The default location for the legend is below the title.

4 To set a background colour for the area on which the gauge appears, click the Background Colour field, and make a selection.

5 To show the title in a colour, click the Text Colour field, and make a selection.

6 To show a border along the edges of the background, click the Border Colour field, and make a selection.

7 Specify the number of gauges to appear per row, and the space between them.

The space between gauges is measured in pixels.

8 Click OK.

The gauge view refreshes. The view may resize to accommodate your selections.

Adding Titles and Footers in Gauge View

You can specify a title, a subtitle, a footer, and a secondary footer for the gauge. If the background holds multiple gauges, titles and footers appear for each gauge. Titles and footers are optional.

To add titles and footers in a gauge view

1 Click the Gauge Titles button at the top of the gauge view page.

2 In the Gauge Titles dialog box, type the text to use, and click OK.

NOTE: As with the Narrative view, you can use @n to include the results from the designated column in the gauge titles. For example, @1 inserts the results from the first column, and @3 inserts the results from the third column. For more information, see Adding Narrative Text to Results (on page 1232).

The gauge view refreshes.

Adding Gauge Ranges in Gauge View

Gauge ranges identify the minimum and maximum values for each range and include a colour in which the range will appear in the gauge, such as green for acceptable, yellow for warning, and red for critical.

You can set gauge ranges to a static value, the column name of the measure, or as the result of an SQL query.

To set a gauge range in a gauge view

1 Click the Gauge Ranges button at the top of the gauge view page.

2 In the Gauge Ranges dialog box, do the following:

    a Type a caption for the range.

    b To set the minimum and maximum gauge ranges, click the Properties button, and make a selection from the Advanced Options dialog box.

    c To specify the colour for the range, click the Colour field, and make a selection.

3 Click OK.

The gauge view refreshes.

Specifying Additional Properties for a Gauge in Gauge View

Additional gauge properties include control over the appearance of elements within the gauge, setting properties for scale items such as gauge limits and tick marks, and specifying the interaction to occur when a user clicks the gauge. These properties are set in the Additional Gauge Properties dialog box.

Choices for the appearance of a gauge appear on the Appearance tab and include the following items:

■ Whether data labels appear.

Data labels can always appear, appear only when a user pauses the mouse over elements in the gauge, or never appear.

■ Selections for a background colour for the gauge, the colour of text within the gauge, and a border around the gauge.

■ The height and width of the gauge, in pixels.

Choices for scale properties appear on the Scale tab and include the following items:

■ Default or custom gauge limits.

■ The number of major and minor tick marks.

Choices for the user interaction with the gauge appear on the Interaction tab and include the following actions:

■ **Navigate.** Allows the user to navigate to another saved report or dashboard.

■ **None.** Disables navigation from the gauge.

You can also set advanced properties for the Bar gauge type by clicking the icon.

To specify additional properties in a gauge view

1 Click the Additional Gauge Properties button at the top of the gauge view page.

2 In the Additional Gauge Properties dialog box, make your selections from the Appearance, Scale, and Interaction tabs.

3 Click OK.

The gauge view refreshes.

Setting Advanced Properties for the Dial in a Dial Gauge

Advanced properties allow you to specify whether scale labels should appear and what value they should show, set the dial arc length, and select the thickness of the dial.

The following choices are available for the display of scale labels:

- Percentage of total

- Actual value

The dial arc length is expressed in degrees. For example, specifying 360 results in a dial gauge that is a complete circle.

The dial thickness is expressed in pixels. As you specify larger values, the gauge becomes thicker, and the inner perimeter of the dial becomes smaller. Specifying extremely large values relative to the dial size may cause the gauge to become distorted and is not recommended.

To specify advanced properties for the dial in a dial gauge

1 Click the Advanced Properties button at the top of the gauge view.

2 In the Dial Specific Properties dialog box, make your selection to indicate how the scale labels are displayed.

   To suppress the display of scale labels, select None.

3 To set the dial arc length and dial thickness, click the option to specify them manually and enter values.

4 Click OK.

   The gauge view refreshes.

Showing Filters Applied to Results

Use the filters view to show the filters in effect for a report. For information about adding filters to a report, see Adding Filters to Columns (on page 1164).

To add or modify a Filters view

1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:
   - To add a new filters view, click Add View, and then select Active Filters.
   - To edit an existing filters view, click the Edit View button for the filters view.

   The workspace shows the filters view.

2 When you are done, click OK.

3 Save the report.

Adding Mark-up Text to Results

Use the Static Text view to add or edit mark-up text to appear with the results. You can add mark-up text that contains formatted text, ActiveX controls or JavaScript, sound bites, animation, specialised logos, and so on. The mark-up text may contain anything that is supported by your browser.

This section provides the procedure for adding or modifying a Static Text view and some examples of static text. If you find an example that is similar to what you want to do, you can copy it and tailor it to your needs.

To add or modify a Static Text view

1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:

   ■ To add a new static text view, click Add View, and select Static Text.

   ■ To edit an existing static text view, click the Edit View button for the static text view.

   The workspace shows the Static Text view.

2 Enter the mark-up text into the text box.

   To make text appear bold, in italics or underlined, click the appropriate button to insert the beginning and ending HTML tags, and then type the text between the tags, or select the text first and then the formatting button.

   NOTE: To include a line break, use the Line Break button. Pressing Enter does not result in multiple lines of text.

   The following table describes several examples.

Static Text View Example	Description and Usage Notes

HTML text	Paste or type the HTML (or appropriate formatted text) in the text box. You can also click the HTML tag buttons. Based on the format of the text you are entering, mark-up tags may be used to control the format of the text. The following are some examples of what you can do:
	
	■ To set font size and colour:
	
	`<FONT SIZE="4" COLOR="red">Red Text</FONT>`
	
	■ To combine tags for additional effects:
	
	`<B><FONT COLOR="red">Bold Red Text</FONT></B>`

ActiveX object	The Active-X object must be self-contained and supported by your browser. Paste or type the object into the HTML Text window, making sure to include the beginning and ending tags <object...> and </object>.
JavaScript or VBScript	The script must be self-contained and supported by your browser. Paste or enter the script into the text box, making sure to include the beginning and ending tags <script> and </script>.

Static Text View Example	Description and Usage Notes
Audio	Make sure you know where the audio clip is located. If the audio clip is for use in a shared environment, it must be located on a network drive accessible to all users.
	Use the HTML tag <EMBED> to add audio, in the following format:
	`<EMBED SRC="audio" AUTOSTART="true" LOOP="true" HIDDEN="true"></EMBED>`
	where:
	■ *"audio"* is the location and name of the audio clip.
	To add an audio clip located on your hard drive, see the following HTML example:
	`<EMBED SRC="c:\mycomputer\MIDIfiles\wakeup.mid" AUTOSTART="true" LOOP="true" HIDDEN="true"></EMBED>`
	To add the same audio clip from a shared location on your Web server, use the following HTML example:
	`<EMBED SRC="http://ourwebserver.company.com/sounds/wakeup.mid" AUTOSTART="true" LOOP="true" HIDDEN="true"></EMBED>`
Background image	The following example uses JavaScript.
	Make sure you know where the image to be used as the background is located. If the image is for use in a shared environment, it must be located on a network drive or Web site accessible to all users.
	If the image is located in a shared dashboard files folder, see the following sample HTML:

	`<script language="javascript">`
	`document.body.background =`
	`"http://ourwebserver.company.com/graphics/"NameOfGraphic";</script>`

	where:
	■ *NameOfGraphic* is the name of the file to use, such as bricks.gif or sand.jpg.

1 To apply cosmetic formatting to the font used in the static text view, click the Format View button.

2 To import the font formatting from a previously saved view, click the Import Formatting from Another Analysis button, and navigate to the saved view.

Note: You can import formatting from reports that have formats from Step 2 (Creating Layouts). Formatting from Step 1 (Defining Criteria) cannot be imported.

3 When you have finished, click OK.

4 Save the report.

Adding Legends to Reports Using Legend View

Use the Legend view to document the meaning of special formatting used in a report, such as the meaning of custom colours applied to gauges.

For example, you may use conditional formatting in a report to show critical items in the colour red and items that need attention in the colour yellow. You can add a legend with text that documents the meaning of the colours and captions that summarise the appropriate action. You can use cosmetic formatting to make the background colours of the text match the colours in the conditional report.

To add or modify a legend view

1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:

■ To add a new legend view, click Add View, and select Legend.

■ To edit an existing legend view, click the Edit View button for the legend view.

The workspace shows the legend view.

2 In the Captions field, select where you want the caption to be displayed.

The options are Right, Left, or None. If you do not want a caption to be displayed, select None.

3 In the Legend Items per Row field, select the number of legend items that you want for each row.

4 (Optional) Enter a title for the legend, such as Legend.

5 In the first Caption text box, type the meaning of the condition, such as Requires Immediate Attention.

6 In the first Sample Text text box, type the first condition you want to document, such as Critical.

You can use the common formatting dialog box to set the background colour, such as red. Entering text is optional. You can just set a background colour if desired.

7 To add another caption, click the Add Item button.

8 When you finish adding captions, click OK.

9 Save the report.

Allowing Users to Change Columns in Reports

Use the Column Selector view to allow users to dynamically change which columns appear in a report. One column selector can be attached to each column in a specific report, and multiple columns (attributes) can be attached to each column selector.

To add or modify a Column Selector view

1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:

◼ To add a new column selector view, click Add View, select Advanced, and then select Column Selector.

◼ To edit an existing column selector view, click the Edit View button for the column selector view.

The workspace shows the options and settings for the view.

2 Select the Enable checkbox for each column in which you want a column selector to appear.

3 Enter a Column Label for each selector and select a Label Position for the label.

NOTE: If you do not enter a label, users viewing the results will not see a label on the selector.

4 If you want results to be refreshed as soon as a user selects any new choice from a column selector, select the Automatically refresh when a new column is selected check box. If you deselect this check box, users see a Go button next to the column selectors, and must click Go to see the new results.

5 Select the Display Results check box to preview the column selector view.

6 Click OK to return to the Layout Views page.

7 To move or edit the column selector view (and other views, as required) on the page, do the following:

◼ To move a view to a different location on the page, drag the view, and drop it in the new location.

◼ To format the appearance of the column selector view, click the Format View button for the view.

You can specify Cell, Border, Background, and Additional Formatting Options (Width, Height, Indent, Right Padding, Top Padding, Bottom Padding).

◼ To edit the column selector view, click the Edit View button for the view.

◼ To delete the column selector view, click the Delete View button for the view.

8 When you finish making your changes, save the report.

Allowing Users to Select a Specific View Using View Selector View

Use a View Selector view to select a specific view of the results from among the saved views. When placed on a report, the view selector appears as a drop-down list for users to select the specific result view they want to see.

To add or modify a View Selector view

1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:

◼ To add a new view selector view, click Add View, select Advanced, and then select View Selector.

■ To edit an existing view selector view, click the Edit View button for the view selector view.

The workspace shows the view selector view.

2 (Optional) Type a caption for the view selector and indicate where the caption should appear relative to the view selector.

3 Make your selections for the view choices that you want to include in the view selector:

■ Select views from the Available Views box, and move them to the Views Included box.

■ In the Views Included box, click the Rename button to rename a selected view.

NOTE: The None view shows the selector only.

4 Select the Display Results check box to preview the view selector view.

5 Click OK to return to the Layout Views page.

6 To move or edit the view selector view (and other views, as required) on the page, do the following:

■ To move the view to a different location on the page, drag the view, and drop it in the new location.

■ To format the appearance of the view selector view, click the Format View button for the view.

You can specify Cell, Border, Background, and Additional Formatting Options (Width, Height, Indent, Right Padding, Top Padding, Bottom Padding).

■ To edit the view selector view, click the Edit View button for the view.

■ To delete the view selector view, click the Delete View button for the view.

7 When you finish making your changes, save the report.

Showing Results in Funnel Charts

Use the Funnel Chart view to show results as a three-dimensional chart that represents target and actual values and levels by colour. Typically, funnel charts are used to graphically represent data related to stages in a process, such as the amount of potential revenue shown for each sales stage.

Funnel charts are well suited for showing actual compared to targets for data where the target is known to decrease (or increase) significantly per stage, such as a sales pipeline. You can click on one of the coloured areas to drill down to more detailed information.

In funnel charts, the thresholds indicate a percentage of the target value, and colours provide visual information for each stage:

■ All stages for which the actual value falls below the minimum threshold are coloured in red.

■ All stages for which the actual value falls below the maximum threshold are coloured in yellow.

■ All stages for which the actual value is greater than the maximum threshold are coloured in green

To add or modify a Funnel Chart view

1   In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:

   ■   To add a new funnel chart view, click Add View, select Advanced, and then select Funnel Chart.

   ■   To edit an existing funnel chart view, click the Edit View button for the funnel chart view.

   The workspace shows the options and settings for the funnel chart view.

2   Make your selections for the fields in the workspace.

   The following table describes the fields.

Funnel Chart View Workspace Field	Description
Chart Title	Specifies the title to display at the top of the chart.
Stage	Identifies the stage to represent, from the drop-down list. These values are shown on the horizontal axis.
Actual Value	Specifies the actual value for the stage, a column selected from the drop-down list.
Target Value	Specifies the target value for the stage, a column selected from the drop-down list.
Target value for final stage only	Indicates whether the target value should appear for each stage or for the final stage only.
Factor required to meet target	Identifies the factors required to meet targets.
Minimum Threshold	Specifies the minimum threshold. Values below this percentage will appear in red. Values between this percentage and the Maximum Threshold will appear in yellow.
Maximum Threshold	Specifies the maximum threshold. Values above this percentage will appear in green.
Size	Specifies the size.
Force standard shape and equal stage widths	Indicates whether Oracle CRM On Demand Answers automatically forces a standard shape and equal-stage widths in the chart.
Interaction	Indicates the level of interaction allowed in the chart. Choices include None, Drill, and Navigate.

3   Select the Display Results check box to preview the funnel chart view.

4   Click OK to return to the Layout Views page.

5   To move or edit the funnel chart view (and other views, as required) on the page, do the following:

   ■   To move the view to a different location on the page, drag the view, and drop it in the new location.

- To format the appearance of the funnel chart view, click the Format View button for the view.

  You can specify Cell, Border, Background, and Additional Formatting Options (Width, Height, Indent, Right Padding, Top Padding, Bottom Padding).

- To edit the funnel chart view, click the Edit View button for the view.

- To delete the funnel chart view, click the Delete View button for the view.

6 When you finish making your changes, save the report.

Adding Narrative Text to Results

Use the Narrative view to add one or more paragraphs of text to appear with the reports. Narrative text is useful for providing information such as context, explanatory text or extended descriptions. You can perform the following actions in the narrative view:

- Type a sentence with placeholders for each column in the results.

- Specify how rows should be separated.

- Use formatting buttons to make text bold, italic or underlined, and to insert line breaks.

- Apply cosmetic formatting to the fonts used in the narrative view, or import the font formatting from a previously saved view.

Sample Usage Scenario for Narrative Text View

A user creates a report that returns the region name in the second column as part of the result set. The user wants the Narrative view to appear as shown in the following example, with introductory text and each region listed on a new line:

This report shows your sales by region. The regions are:

East Region

West Region

The following table lists and describes the user&rsquo;s narrative view entries:

Field	Entry	Explanation
Prefix	[b] This report shows your sales by region. The regions are:[/b][br][br]	The entry prefixes the narrative with text. The text is formatted to appear in bold type and is followed by two line breaks. The user positions the cursor into the Prefix text box and clicks the bold text button (**B**) to insert the tags to start and end bolded text. The user types the following text between the tags: This report shows your sales by region. The regions are:

Field	Entry	Explanation
		The user then clicks the Line Break button twice.
Narrative	@2	The entry includes the results from the second column (the region name) in the narrative text.
		The user positions the cursor in the Narrative text box and types the characters @2.
Row Separator	[br]	The entry starts each row of the narrative text on a new line.
		The user positions the cursor in the Row Separator text box and clicks the Line Break button twice.
Postfix	[br][b] End of Sales by Region report[/b]	The entry appends text to the narrative, in the same manner as the Prefix.

Reserved Characters in the Narrative View

In the narrative view, the following characters are reserved characters:

@   (at sign, unless used as a column placeholder in the Narrative text box)

[(left bracket)

]   (right bracket)

'   (single quote)

\   (back slash)

NOTE: If you want to include a reserved character, precede it with a backward slash character (\) to escape it. For example, to include a backward slash character in narrative text, type \\.

Adding or Modifying Narrative Views

The following procedure provides the steps to construct a narrative view.

In the Prefix, Narrative and Postfix text boxes, you can use the formatting buttons to make text appear in bold, italic or underlined type.

NOTE: To include a line break, use the Line Break button. Pressing Enter does not result in multiple lines of text.

To add or modify a narrative view

1   In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:

- To add a new narrative view, click Add View, select Advanced, then select Narrative.

- To edit an existing narrative view, click the Edit View button for the view.

The workspace shows the options and settings for the narrative view.

2 Enter your selections for the fields in the workspace.

The following table describes the fields.

Narrative View Workspace Field	Comments
Prefix	Specifies the header for the narrative. This text appears at the beginning of the narrative.
Narrative	Indicates the narrative text that will appear for each row in the results. Use @n to include the results from the designated column in the narrative. For example, @1 inserts the results from the first column in the narrative, and @3 inserts the results of the third column.
Row separator	Specifies a row separator tag. To use a separator other than the default for the format, enter the desired row separator in the Row Separator text box.
Postfix	Specifies the footer for the narrative. The text appears at the end of the narrative.

3 To apply cosmetic formatting to the font used in the narrative view, click the Format View button.

4 To import the font formatting from a previously saved view, click the Import Formatting from Another Analysis button, and navigate to the saved view.

Note: You can import formatting from reports that have formats from Step 2 (Creating Layouts). Formatting from Step 1 (Defining Criteria) cannot be imported.

5 Select the Display Results check box to preview the narrative view.

6 Click OK to return to the Layout Views page.

7 To move or edit the narrative view (and other views, as required) on the page, do the following:

■ To move the view to a different location on the page, drag the view, and drop it in the new location.

■ To format the appearance of the narrative view, click the Format View button for the view.

You can specify Cell, Border, Background, and Additional Formatting Options (Width, Height, Indent, Right Padding, Top Padding, Bottom Padding).

■ To edit the narrative view, click the Edit View button for the view.

■ To delete the narrative view, click the Delete View button for the view.

8 When you finish making your changes, save the report.

Showing Results in Scrolling Tickers

A ticker displays the results of a report as a marquee (moving results that scroll across the page). You can customise the size of the scroll area, the speed and direction in which the results scroll, and other display settings.

NOTE: If your Web browser does not support moving text, the results will appear, but they will not scroll across the page.

To add or modify a Ticker view

1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:

   ■ To add a new ticker view, click Add View, select Advanced, then select Ticker.

   ■ To edit an existing ticker view, click the Edit View button for the ticker view.

   The workspace shows the options and settings for the ticker view.

2 To generate default settings for the most commonly used fields, click the Set Defaults button.

   CAUTION: If you click the Set Defaults button after entering values in other fields, your entered values are cleared.

3 To clear all fields, click the Clear Fields button.

   NOTE: After you clear all fields, you can click the Set Default button to restore default settings for the most commonly used fields.

4 Make your selections for the fields in the workspace.

   The following table describes the fields.

Ticker View Workspace Field	Description
Behaviour	Specifies how the results move in the ticker: **Scroll.** The results start hidden, scroll on to the page, then off the page before repeating. **Slide.** The results start hidden, scroll on to the page, then stop once touching the other side. **Alternate.** The results bounce back and forward inside the marquee.
Direction	Specifies the direction the results move in the ticker (Left, Right, Down, or Up).
Width	Specifies the width of the ticker, either in pixels, or as a percentage of the page width. For example, a value of 200 indicates a width of 200 pixels, and a value of 25% indicates a width of one-quarter of the

Ticker View Workspace Field	Description
	page.
Height	Specifies the height of the ticker, either in pixels, or as a percentage of the page height.
	For example, a value of 200 indicates a height of 200 pixels, and a value of 25% indicates a height of one-quarter of the page.
Beginning Text	Specifies any optional text or graphics to display at the beginning of each redraw of the results. You can use HTML to format the text.
	If you include an image, make sure you know where the image is located. If the image is for your use only, the following is a sample location:
	c:\mycomputer\temp\report.gif
	If the image is for use in a shared environment or web site, it must be located on a network drive accessible to all users. For a shared image, specify the UNC name, for example:
	\\ALLUSERS\graphics\report.gif
Row Format	Specifies the HTML to use in formatting the rows in the results.
	To include the results from a designated column, use @n. For example, @1 inserts the results from the first column, and @3 inserts the results of the third column.
Row Separator	Specifies the character that separates one row from another.
Column Separator	Specifies the character that separates one column from another. This is used when Row Format is blank, which results in all columns being displayed.

Ticker View Workspace Field	Description
Ending Text	Specifies any optional text or graphics to display at the end of each redraw of the results. You can use HTML to format the text.
	If you include an image, make sure you know where the image is located. If the image is for your use only, the following is a sample location:
	c:\mycomputer\temp\report.gif
	If the image is for use in a shared environment or web site, it must be located on a network drive accessible to all users. For a shared image, specify the UNC name, for example:
	\\ALLUSERS\graphics\report.gif

NOTE: Several of these fields are pre-populated with HTML that provides initial formatting. Take care when editing this text, so that the original HTML is still valid. If you remove the HTML from one of the fields, you should remove it from the others, too, otherwise the ticker will not function correctly.

5 To specify additional options, perform the following actions:

a Click the Advanced button.

The Advanced Ticker Options dialog box appears.

b Make your selections for the advanced options and click OK.

The following table describes the advanced options.

Advanced Options in the Ticker View Workspace	Description
# of Loops	Specifies the number of times that the results will scroll. The default is an infinite number of times.
	You must specify a whole number.
Scroll Amount	Sets the number of pixels between successive redraws of the results. Larger values cause faster, less smooth scrolling.
Scroll Delay	Specifies the number of milliseconds between successive redraws of the results. Large values cause slower scrolling.
Background Colour	Specifies the colour to use for the background. Depending on what your browser supports, you can enter a colour name such as yellow or blue, or use the 6-digit hexadecimal format, such as #AFEEEE for pale turquoise. (You can omit the number sign character from the hexadecimal format.)

Advanced Options in the Ticker View Workspace	Description
Additional Marquee Attributes	Specifies other marquee options that your browser may support, such as ALIGN="top | middle | bottom" to align the ticker to the top, middle or bottom of the text around it. You can also add HTML to further customise the look of the ticker.

6 Select the Display Results check box to preview the ticker view.

7 Click OK to return to the Layout Views page.

8 To move or edit the ticker view (and other views, as required) on the page, do the following:

- To move the view to a different location on the page, drag the view, and drop it in the new location.

- To format the appearance of the ticker view, click the Format View button for the view.

   You can specify Cell, Border, Background, and Additional Formatting Options (Width, Height, Indent, Right Padding, Top Padding, Bottom Padding).

- To edit the ticker view, click the Edit View button for the view.

- To delete the ticker view, click the Delete View button for the view.

9 When you finish making your changes, save the report.

Alerting Users to No Data

Use the No Results view to specify explanatory text to appear if the report does not return any results. The text can help users understand that there was no data.

To add or modify a No Results view

1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:

- To add a new No Results view, click Add View, select Advanced, then select No Results.

- To edit an existing No Results view, click the Edit View button for the view.

   The workspace shows the No Results view.

2 Enter explanatory text into the Headline and Text boxes.

3 Select the Display Results check box to preview the No Results view.

4 Click OK to return to the Layout Views page.

5 To move or edit the No Results view (and other views, as required) on the page, do the following:

- To move the view to a different location on the page, drag the view, and drop it in the new location.

- To format the appearance of the No Results view, click the Format View button for the view.

  You can specify Cell, Border, Background, and Additional Formatting Options (Width, Height, Indent, Right Padding, Top Padding, Bottom Padding).

- To edit the No Results view, click the Edit View button for the view.

- To delete the No Results view, click the Delete View button for the view.

6 When you finish making your changes, save the report.

Step 3: Defining Prompts (Optional)

To allow Oracle CRM On Demand Answers users to specify a filter value when they run a report, define a run-time prompt for the report. Runtime prompts are useful because reports may need to be filtered differently based upon different users or the dates that reports are run.

A runtime prompt differs from a prebuilt filter in that a filter is set up when the report is defined and cannot be changed without revising the report itself. For example, if you define a prompt on Account Type for the report, your employees are prompted to select which Account Type value to see when they run the report. If you define the prebuilt filter as a specific Account Type, such as Competitor, the filter is hard-coded and cannot be altered by the user at runtime.

You can create prompts on the Define Prompts page in Oracle CRM On Demand Answers. To access the Define Prompts page, either create a new analysis, as described in Getting Started with Answers (Custom Reports) (on page 933), or open an existing analysis in Oracle CRM On Demand Answers.

There are two types of prompts that you can create:

- Column filter prompt

  A column filter prompt provides general filtering of a column within a report. A column filter prompt can present all choices for a column, or, it can present constrained choices for a column. For example, if a report contains a Region=East filter, constraining choices for the City column restricts the selections to cities in the East region only. This eliminates the selection of a mutually exclusive filter that could result in no data.

- Image prompt

  An image prompt provides an image that users click to select criteria for a report. For example, in a sales organisation, users can click their territories from an image of a map to see sales information, or click a product image to see sales information about that product. Users who know how to use the HTML <map> tag can create an image map definition.

NOTE: In Oracle CRM On Demand Answers, you do not see the prompts in the Define Criteria, Create Layout, Define Prompts, and Review pages. The prompts are displayed when you preview the analysis, and the prompts are displayed when users run the analysis.

Related Topics

See the following topics for related information:

- Adding Column Filter Prompts (on page 1240)

■ Adding Image Prompts (on page 1242)

Adding Column Filter Prompts

A column filter prompt allows users to select values for filtering a column in a report. You can define the range of possible filter values and how the user selects the filter values for the report.

You define column filter prompts in the Define Prompts page in Oracle CRM On Demand Answers. When you have multiple column filter prompts constructed for a report, they are presented to the user one at a time in the order they are listed, from top to bottom.

To add or modify a column filter prompt

1 In Oracle CRM On Demand Answers, in the Define Prompts page, click Create Prompt, and select Column Filter Prompt.

2 In the Prompt Properties dialog box, enter a caption for the column filter prompt in the Caption box.

The caption appears when a user runs the report.

3 Enter a description in the Description box (optional).

4 From the Filter on Column drop-down list, select the column in the report that you want to filter, and then, from the Operator drop-down list, select the operator to be used.

If you want the user to select the operator, select the operator *Prompt User.

5 Specify how the user should select values by clicking the appropriate option.

Users can select values from a drop-down list, or browse through choices and enter them into a text box.

NOTE: A maximum of 1000 values are permitted if selected from a drop-down list.

6 To allow the user to select only one value for the column filter prompt, select the Single Value Only checkbox.

7 Under the What values should be shown to the user item, select one of the following options:

■ To show no values, click None.

The user will need to enter the value.

■ To show all possible values, click All Values.

■ To show a subset of values, click Filter Limited Values or SQL Results.

Filter Limited Values. Limiting values is useful when prompting for multiple columns, or when the results already contain a filter. It prevents a user from choosing values that would result in no data. For example, suppose a report contains a country column and a city column, and already contains the filter Country=France. By selecting limited values for the city column filter, the choices are restricted to cities in France only, which prevents the possibility of

choosing mutually exclusive filters, such as Country=Italy and City=Paris. Limiting values might require more time to process the prompt compared to the two other options.

SQL Results. To limit the values to the results with an SQL statement, click the option SQL Results and type the SQL statement into the text box. When you use an SQL Results prompt, the following conditions apply:

- You cannot chain SQL Results prompts. For example, if you have two SQL Results prompts, the filtered values from one prompt do not affect the other prompt.

- If the first prompt is an SQL Results prompt and the second prompt is a normal prompt, then the result of the second prompt is limited to the results of the first prompt if the second prompt has the option, Filter Limited Values, selected. If the first prompt is a normal prompt and the second prompt is an SQL Results prompt, then the two prompts cannot be chained.

- Non-SQL Results prompts can always be chained regardless of the order of the prompts.

- The maximum number of values available for the prompt drop-down list is 1,000. If the SQL result returns more than 1,000 records, then only the first 1,000 records are displayed.

8 Make selections for the options in the Other options area:

- To allow the user to restrict the filter choices, select the Allow user to constrain choices checkbox. If this checkbox is selected, the users are presented with a picklist from which they can select conditions (such as begins with, ends with and contains) to restrict the choices.

  Restricted choices help the user to locate the values to be used as a filter. For example, if a filter contains all the cities in France, a user can restrict the filter choices to those cities starting with P.

- To allow a user to skip this column filter, select the Allow user to skip prompt checkbox.

  This causes a Skip Prompt option to appear. The user can then click this option to bypass making a selection for this filter.

9 When you have finished, click OK.

The column filter prompt is shown on the Define Prompts page.

10 To view the column filter prompt, click the Preview Analysis button.

To modify the properties of a column filter prompt

1 Click the properties button for the prompt.

2 In the Prompt Properties dialog box, make your changes, and then click OK.

To move a column filter prompt up or down in the execution order

- Click the up and down arrows until the prompts are in the order that you want.

  The up and down arrows appear only when there is more than one prompt for the analysis.

To delete a column filter prompt

■ Click the delete button for the prompt.

Adding Image Prompts

An image prompt provides an image that users click to select their report criteria. For example, from an image that shows products, users can click a product. The selected product is then used to filter the underlying report. To create an image prompt, you need to know how to use the HTML <map> tag to create an image map definition.

You define image prompts in the Define Prompts page in Oracle CRM On Demand Answers. When you have created multiple image prompts for a report, they are executed in the order in which they are listed; that is, from top to bottom.

To add or modify an image prompt

1   In Oracle CRM On Demand Answers, in the Define Prompts page, click Create Prompt, and select Image Prompt.

2   In the Image Map Prompt Properties dialog box, enter a caption for the image prompt in the Caption box.

    The caption appears when a user runs the report. You can include HTML mark-up tags in the caption, such as <b>, <center>, <font>, and <table>.

3   Enter a description in the Description box (optional).

4   Enter the location and name of the image in the Image URL box.

    If the image prompt is for your use only, you can specify a location that only you can access, such as c:\mycomputer\temp\map.gif. For an image prompt that will be available to other users, specify the Universal Naming Convention (UNC) name, such as \\ALLUSERS\graphics\map.gif, or a website accessible to all your users, such as http://mycompany.co.uk/imagemap.gif.

5   Enter the appropriate HTML <map> tags and data in the HTML box.

    An HTML <map> statement with <area> elements is required. Each <area> element must specify shape= and coords= attributes. The alt= attribute, if specified, will be mapped to the Area title. For example:

    <map>

        <area alt="Top-left" shape="rect" coords="0, 0, 50, 50">

        <area alt="Top-right" shape="rect" coords="50, 0, 100, 50">

        <area alt="Bottom" shape="rect" coords="0, 50, 100, 100">

    </map>

6   To extract the image map information from the HTML, click the link Extract Image Map from HTML.

The Image Map Prompt Properties dialog box expands to show the area titles, shapes and coordinates entered in the HTML box.

- You can change the values in the area title if you want. This text appears when a user moves the pointer over the image area.

- For each area, in the Column box, enter the name of the column to be passed when a user clicks it, and the value that is to be used.

   NOTE: The column needs to be a fully qualified column name, in the format *Table.Column Name*.

- Place double quotes around any column names containing spaces. For example:

   - Account."Account Country"

   - "Units shipped"

7 When you have finished, click OK.

   The image prompt is shown on the Define Prompts page.

8 To view the image prompt, click the Preview Analysis button.

   When you click an area of the image, the underlying filter constructed for that area displays. You can click the Refresh link to see the results. You can change the filter criteria and then click the Refresh link again to see the change reflected in the results.

To modify the properties of an image prompt

1 Click the Properties button for the prompt.

2 In the Image Map Prompt Properties dialog box, make your changes, and then click OK.

NOTE: In Oracle CRM On Demand Answers, you do not see the prompts in the Define Criteria, Create Layout, Define Prompts, and Review pages. The prompts are displayed when you preview the analysis, and the prompts are displayed when users run the analysis.

Step 4: Reviewing Reports

When you finish creating or modifying a report, you can review it in the Review page in Oracle CRM On Demand Answers.

To review a report

- In Oracle CRM On Demand Answers, click Step 4 Review.

When you finish reviewing your report criteria, layout, and so on, you can click the Preview Analysis button to view the final version of the report in a separate window.

NOTE: You must click Preview Analysis to see any prompts that you defined in the report.

From the Review page, you also have the option to print or download the report.

Related Topics

See the following topics for related information:

■ Making Custom Reports Public (on page 1244)

■ Finishing Your Analysis (on page 1245)

Making Custom Reports Public

Before making a report available to all employees, verify its content and format by running a test and getting approval by the person who requested the report. The reviewer should check for the following:

■ Report includes all necessary columns.

■ Columns are sorted correctly.

■ Filters are limiting the data correctly.

■ Charts present the data in a useful way.

You can release the reports that you created so that all employees at your company can use them. Those reports appear in the Shared Custom Analyses section on their Reports Homepage.

Note: The Reports Homepage has a limit of 100 custom reports.

To make your report public

1 In Oracle CRM On Demand, click the Reports tab.

2 On the Reports Homepage, in the Custom Reports and Analyses section, click Design Analyses to open Oracle CRM On Demand Answers.

3 In Oracle CRM On Demand Answers, open the report.

4 Click Save.

5 Select the folder where you want to save the report.

6 Click OK to save the report.

Making a report public releases the report so that other employees at your company who have visibility to the folder, where you saved it, can access the report. Your private report in My Folders is still saved in case you want to run it or revise it for dynamic analysis later.

Finishing Your Analysis

When you finish defining the criteria, layout, and optional prompts for your analysis in Oracle CRM On Demand Answers, you save it.

To finish your analysis and save it

1   In Oracle CRM On Demand Answers, in the Define Criteria page, Create Layout page, Define Prompts page, or Review page, click the Finish button.

2   Select the folder where you want to save the report.

   TIP: Save the report as a private one first using My Folders. After checking the setup, you can save it to public Shared Folders if you want to allow others to use it, and then delete it from My Folder. Reports saved in Shared Folders are accessed from the Shared Custom Analyses link within the Custom Reports and Analyses section on the Reports Homepage, and are visible to all employees who have access to the folder where you saved the report.

   Note: If your user role has the Manage Custom Reports privilege you can create, edit, and save reports in all folders.

3   Enter a name for your report.

   TIP: Use a consistent naming convention that all users will recognise. Also, avoid using extra blank spaces or symbols, such as apostrophes, when naming reports.

4   Enter a short description of the report, up to a maximum of 2,000 characters. The information that you enter for both the name and description appears on the employees&rsquo; Reports Homepage exactly as you enter it.

   TIP: Use the description to let users know if the report contains historical or real-time data.

5   Click OK.

   The report is saved, the Build and View Analysis window is closed, and the Getting Started With Answers page is displayed. Your custom report is stored in the folder that you specified. You can access it later in Oracle CRM On Demand Answers by clicking the Open Analysis button.

Using Functions in Analyses

SQL functions perform various calculations on column values. This section explains the syntax for the functions supported by Oracle CRM On Demand Answers. It also explains how to express literals. There are aggregate, string, math, calendar date/time, conversion, and system functions.

You can use functions anywhere that formulas or SQL expressions are allowed within Oracle CRM On Demand Answers. For example:

■   **Column formulas.** For more information, see Setting Up Column Formulas (on page 1184).

■   **Filter formulas.** For more information, see Adding Filters to Columns (on page 1164).

■   **Bins.** For more information, see Adding Filters to Columns (on page 1164).

Formula Names

When referring to a column in a function, you must use its internal formula name. All columns have two different names:

■ The *display name* of the column is the name that you see displayed in the Active Subject Area section on the left side of the page, under a specific folder name. These names are used as the default labels for column headings. The names change depending on the language setting of the user, as well as any field name changes made by your company's Oracle CRM On Demand administrator.

■ The *formula name* is a fixed, internal name for each column. These names are always in English. Formula names contain two parts that are separated by a period. The first part corresponds to the folder name, and the second part corresponds to the column. If there are any spaces in either the folder name or the column name, then that part must be enclosed in double quotes. The folder name part of the formula name is often the same as the displayed folder name, but not always.

The following table provides examples of formula names that correspond to specific folder and display names for a column.

Folder Name	Display Name	Formula Name
Account	Main Phone #	Account."Phone Number"
Account	Annual Revenues	Account."Annual Revenue"
Date Created	Fiscal Qtr/Yr	"Date Created"."Fiscal Quarter/Yr"
Owned By User	User ID	Employee."Employee ID"

Finding the Formula Name

To determine the formula name for a column, first add the column to a report. Click Edit Formula [fx], and then the Column Formula tab in the resulting dialog box. The formula name for that column can be found in the Column Formula text box.

TIP: When the cursor is in the Column Formula dialog box, clicking a column in the Action bar inserts the column's formula name directly into the text box at the cursor location (but the column is not added to the list of columns for the report). This shortcut works only for the Column Formula dialog box, not for other dialog boxes where SQL can be entered.

For more information, see the following topics:

■ Expressing Literals (on page 1247)

■ Aggregate Functions (on page 1248)

■ String Functions (on page 1258)

■ Math Functions (on page 1265)

■ Calendar Date/Time Functions (on page 1272)

■ Conversion Functions (on page 1280)

■ System Functions (on page 1281)

Expressing Literals

A literal is a non-null value corresponding to a given data type. Literals are typically constant values; that is, they are values that are taken literally *as is*, without changing them at all. A literal value has to comply with the data type that it represents.

This section describes how to express each type of literal in Oracle CRM On Demand Answers.

Character Literals

A character literal contains characters such as letters, numbers and symbols. To express a character literal, enclose the character string within single quotes ('). The length of the literal is determined by the number of characters between the single quotes.

Date time Literals

The SQL 92 standard defines three kinds of typed date time literals in the following formats:

DATE 'yyyy-MM-dd'

TIME 'hh:MM:ss'

TIMESTAMP 'yyyy-MM-dd hh:mm:ss'

These formats are fixed. To express a typed date time literal, use the keywords DATE, TIME, or TIMESTAMP followed by a date time string enclosed in single quote marks. Two digits are required for all non-year components even if the value is a single digit.

Example:

```
CASE

    WHEN Opportunity."Close Date" >= TIMESTAMP '2006-01-01 00:00:00' THEN '2006'

    ELSE 'Pre-2006'

END
```

Numeric Literals

A numeric literal represents a value of a numeric data type. To express a numeric literal, simply include the number.

Do not enclose numeric literals within single quotes; doing so expresses the literal as a character literal.

A number can be preceded with either a plus sign (+) or minus sign (-) to indicate a positive or negative number, respectively. Numbers can contain a decimal point and decimal numbers.

To express floating point numbers as literal constants, enter a number followed by the letter *E* (either uppercase or lowercase) and followed by the plus sign (+) or the minus sign (-) to indicate a positive or negative exponent. No spaces are allowed between the integer, the letter *E*, and the sign of the exponent.

Examples:

52

2. 98

- 326

12. 5E6

Aggregate Functions

Aggregate functions perform work on multiple values to create summary results. The aggregate functions cannot be used to form a nested aggregation in expressions on columns that have a default aggregation rule predefined by Oracle CRM On Demand Answers.

Avg

Calculates the average (mean) value of an expression in a result set. Has to take a numeric expression as its argument.

Syntax:

    AVG (n_expression)

where:

n_expression   Any expression that evaluates to a numerical value.

AvgDistinct

Calculates the average (mean) of all distinct values of an expression. Has to take a numeric expression as its argument.

Syntax:

    AVG (DISTINCT n_expression)

where:

n_expression   Any expression that evaluates to a numerical value.

BottomN

Ranks the lowest n values of the expression argument from 1 to n, 1 corresponding to the lowest numerical value. The BOTTOMN function operates on the values returned in the result set.

Syntax:

    BOTTOMN (n_expression, n)

where:

n_expression	Any expression that evaluates to a numerical value.
n	Any positive integer. Represents the bottom number of rankings displayed in the result set, 1 being the lowest rank.

NOTE: A query can contain only one BOTTOMN expression.

Count

Calculates the number of rows having a nonnull value for the expression. The expression is typically a column name, in which case the number of rows with nonnull values for that column is returned.

Syntax:

    COUNT (expression)

where:

expression	Any expression.

CountDistinct

Adds distinct processing to the COUNT function.

Syntax:

    COUNT (DISTINCT expression)

where:

expression	Any expression.

Count (*) (CountStar)

Counts the number of rows.

Syntax:

    COUNT(*)

For example, if a table named Facts contained 200,000,000 rows, the following query would return the following results:

    SELECT COUNT(*) FROM Facts

    COUNT(*)

    200000000

Mavg

Calculates a moving average (mean) for the last n rows of data, inclusive of the current row.

The average for the first row is equal to the numeric expression for the first row, the average for the second row is calculated by taking the average of the first two rows of data, the average for the third row is calculated by taking the average of the first three rows of data, and so on. When the nth row is reached, the average is calculated based on the last n rows of data.

Syntax:

    MAVG (numExpr, integer)

where:

numExpr   Any expression that evaluates to a numerical value.

integer   Any positive integer. Represents the average of the
                   last n rows of data.

Max

Calculates the maximum value (highest numeric value) of the rows satisfying the numeric expression argument.

Syntax:

    MAX (expression)

where:

expression   Any expression.

Median

Calculates the median (middle) value of the rows satisfying the numeric expression argument. When there are an even number of rows, the median is the mean of the two middle rows. This function always returns a double.

Syntax:

    MEDIAN (n_expression)

where:

n_expression   Any expression that evaluates to a numerical value.

Min

Calculates the minimum value (lowest numeric value) of the rows satisfying the numeric expression argument.

Syntax:

    MIN (expression)

where:

expression   Any expression.

NTile

The NTILE function determines the rank of a value in terms of a user-specified range. It returns integers to represent any range of ranks. In other words, the resulting sorted data set is broken into a number of tiles where there are roughly an equal number of values in each tile.

Syntax:

    NTILE (n_expression, n)

where:

n_expression   Any expression that evaluates to a numerical value.

n   A positive, nonnull integer that represents the number of tiles.

If the n_expression argument is not NULL, the function returns an integer that represents a rank within the reported range.

NTile with n=100 returns what is commonly called the *percentile* (with numbers ranging from 1 to 100, with 100 representing the high end of the sort). This value is different from the results of the Oracle BI Server percentile function, which conforms to what is called *percent rank* in SQL 92 and returns values from 0 to 1.

Percentile

Calculates a percent rank for each value satisfying the numeric expression argument. The percent rank ranges are from 0 (1st percentile) to 1 (100th percentile), inclusive.

The PERCENTILE function calculates the percentile based on the values in the result set of the query.

Syntax:

    PERCENTILE (n_expression)

where:

n_expression   Any expression that evaluates to a numerical value.

Rank

Calculates the rank for each value satisfying the numeric expression argument. The highest number is assigned a rank of 1, and each successive rank is assigned the next consecutive integer (2, 3, 4,…). If certain values are equal, they are assigned the same rank (for example, 1, 1, 1, 4, 5, 5, 7…).

The RANK function calculates the rank based on the values in the result set of the query.

Syntax:

```
RANK (n_expression)
```

where:

n_expression   Any expression that evaluates to a numerical value.

StdDev

The STDDEV function returns the standard deviation for a set of values. The return type is always a double.

Syntax:

```
STDDEV([ALL | DISTINCT] n_expression)
```

where:

n_expression   Any expression that evaluates to a numerical value.

■   If ALL is specified, the standard deviation is calculated for all data in the set.

■   If DISTINCT is specified, all duplicates are ignored in the calculation.

■   If nothing is specified (the default), all data is considered.

There are two other functions that are related to STDDEV:

STDDEV_POP([ALL | DISTINCT] n_expression)

STDDEV_SAMP([ALL | DISTINCT] n_expression)

STDDEV and STDDEV_SAMP are synonyms.

StdDev_Pop

Returns the standard deviation for a set of values using the computational formula for population variance and standard deviation.

Syntax:

```
StdDev_Pop([ALL | DISTINCT] numExpr)
```

where:

numExpr   Any expression that evaluates to a numerical value.

■ If ALL is specified, the standard deviation is calculated for all data in the set.

■ If DISTINCT is specified, all duplicates are ignored in the calculation.

Sum

Calculates the sum obtained by adding up all values satisfying the numeric expression argument.

Syntax:

```
SUM (n_expression)
```

where:

n_expression   Any expression that evaluates to a numerical value.

SumDistinct

Calculates the sum obtained by adding all of the distinct values satisfying the numeric expression argument.

Syntax:

```
SUM(DISTINCT n_expression)
```

where:

n_expression   Any expression that evaluates to a numerical value.

TopN

Ranks the highest n values of the expression argument from 1 to n, 1 corresponding to the highest numerical value.

The TOPN function operates on the values returned in the result set.

Syntax:

```
TOPN (n_expression, n)
```

where:

n_expression   Any expression that evaluates to a numerical value.

n   Any positive integer. Represents the top number of rankings displayed in the result set, 1 being the highest rank.

A query can contain only one TOPN expression.

Running Aggregate Functions

Running aggregate functions are similar to functional aggregates in that they take a set of records as input, but instead of outputting the single aggregate for the entire set of records, they output the aggregate based on records encountered so far.

This section describes the running aggregate functions supported by the Oracle BI Server.

MAVG

Calculates a moving average (mean) for the last n rows of data in the result set, inclusive of the current row.

Syntax:

    MAVG (n_expression, n)

where:

n_expression   Any expression that evaluates to a numerical value.

n   Any positive integer. Represents the average of the last n rows of data.

The average for the first row is equal to the numeric expression for the first row. The average for the second row is calculated by taking the average of the first two rows of data. The average for the third row is calculated by taking the average of the first three rows of data, and so on until you reach the nth row, where the average is calculated based on the last n rows of data.

MSUM

This function calculates a moving sum for the last n rows of data, inclusive of the current row.

The sum for the first row is equal to the numeric expression for the first row. The sum for the second row is calculated by taking the sum of the first two rows of data. The sum for the third row is calculated by taking the sum of the first three rows of data, and so on. When the nth row is reached, the sum is calculated based on the last n rows of data.

Syntax:

    MSUM (n_expression, n)

Where:

n_expression   Any expression that evaluates to a numerical value.

n   Any positive integer. Represents the sum of the last n rows of data.

Example:

The following example shows a report that uses the MSUM function.

MONTH   REVENUE   3_MO_SUM

JAN	100.00	100.00
FEB	200.00	300.00
MAR	100.00	400.00
APRIL	100.00	400.00
MAY	300.00	500.00
JUNE	400.00	800.00
JULY	500.00	1200.00
AUG	500.00	1400.00
SEPT	500.00	1500.00
OCT	300.00	1300.00
NOV	200.00	1000.00
DEC	100.00	600.00

RSUM

This function calculates a running sum based on records encountered so far. The sum for the first row is equal to the numeric expression for the first row. The sum for the second row is calculated by taking the sum of the first two rows of data. The sum for the third row is calculated by taking the sum of the first three rows of data, and so on.

Syntax:

    RSUM (n_expression)

Where:

n_expression   Any expression that evaluates to a numerical value.

Example:

The following example shows a report that uses the RSUM function.

MONTH	REVENUE	RUNNING_SUM
JAN	100.00	100.00
FEB	200.00	300.00
MAR	100.00	400.00
APRIL	100.00	500.00
MAY	300.00	800.00
JUNE	400.00	1200.00
JULY	500.00	1700.00

AUG	500.00	2200.00
SEPT	500.00	2700.00
OCT	300.00	3000.00
NOV	200.00	3200.00
DEC	100.00	3300.00

RCOUNT

This function takes a set of records as input and counts the number of records encountered so far. It resets its value for each group in the query. If a sort order is defined on any column, then this function does not get incremented for adjoining identical values for the sorted column. To avoid this issue, reports should either not contain a sort order on any column or contain sort orders on all columns.

Syntax:

    RCOUNT (Expr)

Where:

Expr   An expression of any data type.

Example:

The following example shows a report that uses the RCOUNT function.

MONTH	PROFIT	RCOUNT
MAY	300.00	2
JUNE	400.00	3
JULY	500.00	4
AUG	500.00	5
SEPT	500.00	6
OCT	300.00	7

RMAX

This function takes a set of records as input and shows the maximum value based on records encountered so far. The specified data type must be one that can be ordered.

Syntax:

    RMAX (expression)

Where:

expression	An expression of any data type. The data type must be one that has an associated sort order.	

Example:

The following example shows a report that uses the RMAX function.

MONTH	PROFIT	RMAX
JAN	100.00	100.00
FEB	200.00	200.00
MAR	100.00	200.00
APRIL	100.00	200.00
MAY	300.00	300.00
JUNE	400.00	400.00
JULY	500.00	500.00
AUG	500.00	500.00
SEPT	500.00	500.00
OCT	300.00	500.00
NOV	200.00	500.00
DEC	100.00	500.00

RMIN

This function takes a set of records as input and shows the minimum value based on records encountered so far. The specified data type must be one that can be ordered.

Syntax:

```
RMIN (expression)
```

Where:

expression	An expression of any data type. The data type must be one that has an associated sort order.	

Example:

The following example shows a report that uses the RMIN function.

MONTH	PROFIT	RMIN
JAN	400.00	400.00

FEB	200.00	200.00
MAR	100.00	100.00
APRIL	100.00	100.00
MAY	300.00	100.00
JUNE	400.00	100.00
JULY	500.00	100.00
AUG	500.00	100.00
SEPT	500.00	100.00
OCT	300.00	100.00
NOV	200.00	100.00
DEC	100.00	100.00

String Functions

String functions perform various character manipulations, and they operate on character strings.

ASCII

Converts a single character string to its corresponding ASCII code, between 0 and 255.

Syntax:

    ASCII (character_expression)

where:

character_expression   Any expression that evaluates to an ASCII character.

If the character expression evaluates to more than one character, the ASCII code corresponding to the first character in the expression is returned.

BIT_LENGTH

Returns the length, in bits, of a specified string. Each Unicode character is 2 bytes in length, which is equal to 16 bits.

Syntax:

    BIT_LENGTH (character_expression)

where:

character_expression   Any expression that evaluates to character string.

CHAR

Converts a numerical value between 0 and 255 to the character value corresponding to the ASCII code.

Syntax:

```
CHAR (n_expression)
```

where:

n_expression   Any expression that evaluates to a numerical value between 0 and 255.

CHAR_LENGTH

Returns the length, in number of characters, of a specified string. Leading and trailing blanks are not counted in the length of the string.

Syntax:

```
CHAR_LENGTH (character_expression)
```

where:

character_expression   Any expression that evaluates to a numerical value between 0 and 255.

CONCAT

There are two forms of this function. The first form concatenates two character strings. The second form uses the character string concatenation character to concatenate more than two character strings.

Form 1 Syntax:

```
CONCAT (character_expression1, character_expression2)
```

where:

character_expression   Expressions that evaluate to character strings.

Form 2 Syntax:

```
string_expression1 || string_expression2 || ... string_expressionxx
```

where:

string_expression	Expressions that evaluate to character strings, separated by the character string concatenation operator || (double vertical bars). The first string is concatenated with the second string to produce an intermediate string, which is then concatenated with the next string, and so on.

Example:

```
Account."Account Name" ||'-'|| Account."Account Location"
```

Results look like:

```
Action Rentals - Headquarters
```

INSERT

Inserts a specified character string into a specified location in another character string, replacing a specified number of characters in the target string.

Syntax:

```
INSERT (character_expression1, n, m, character_expression2)
```

where:

character_expression1	Any expression that evaluates to a character string. This is the string receiving the insertion.
character_expression2	Any expression that evaluates to a character string. This is the string to insert.
n	Any positive integer representing the number of characters from the start of the first string where a portion of the second string is inserted.
m	Any positive integer representing the number of characters in the first string to be replaced by the entirety of the second string.

LEFT

Returns a specified number of characters from the left of a string.

Syntax:

```
LEFT (character_expression, n)
```

where:

character_expression	Any expression that evaluates to a character string.
n	Any positive integer representing the number of characters from the left of the string that are returned.

LENGTH

Returns the length, in number of characters, of a specified string. The length is returned excluding any trailing blank characters.

Syntax:

```
LENGTH (character_expression)
```

where:

character_expression   Any expression that evaluates to a character string.

LOCATE

Returns the numerical position of one string within another string. If the string is not found, the LOCATE function returns a value of 0. If you want to specify a starting position to begin the search, use the LOCATEN function instead.

Syntax:

```
LOCATE (character_expression1, character_expression2)
```

where:

character_expression1   Any expression that evaluates to a character string. This is the expression to search for in the character expression.

character_expression2   Any expression that evaluates to a character string. This is the expression to be searched.

LOCATEN

Returns the numerical position of one string within another string. This is identical to the LOCATE function, except that the search begins at the position specified by an integer argument. If the string is not found, the LOCATEN function returns a value of 0. The numerical position to return is determined by counting the first character in the string as occupying position 1, regardless of the value of the integer argument.

Syntax:

```
LOCATEN (character_expression1, character_expression2, n)
```

where:

character_expression1   Any expression that evaluates to a character string. This is the string to search for.

character_expression2	Any expression that evaluates to a character string. This is the string to be searched.
n	Any positive, nonzero integer that represents the starting position to begin to look for the locate expression.

LOWER

Converts a character string to lower case.

Syntax:

    LOWER (character_expression)

where:

character_expression   Any expression that evaluates to a character string.

OCTET_LENGTH

Returns the bits, in base 8 units (number of bytes), of a specified string.

Syntax:

    OCTET_LENGTH (character_expression)

where:

character_expression Any expression that evaluates to a character string.

POSITION

Returns the numerical position of one string within another string. If the string is not found, the function returns 0.

Syntax:

    POSITION (character_expression1 IN character_expression2)

where:

character_expression1 Any expression that evaluates to a character string. This is the string to search for.

character_expression2 Any expression that evaluates to a character string. This is the string in

which to search.

REPEAT

Repeats a specified expression n times, where n is a positive integer.

Syntax:

    REPEAT (character_expression, n)

REPLACE

Replaces specified characters in a string with other specified characters.

Syntax:

    REPLACE (character_expression, change_expression, replace_with_expression)

where:

character_expression	Any expression that evaluates to a character string. This string will have its characters replaced.
change_expression	Any expression that evaluates to a character string. Specifies the characters in the first string that will be replaced.
replace_with_expression	Any expression that evaluates to a character string. Specifies the replacement characters to substitute into the first string.

RIGHT

Returns a specified number of characters from the right of a string.

Syntax:

    RIGHT (character_expression, n)

where:

character_expression	Any expression that evaluates to a character string.
n	Any positive integer representing the number of characters from the right of the first string that are returned.

SPACE

Inserts blank spaces.

Syntax:

```
SPACE (integer)
```

where:

integer   Any expression that evaluates to a character string.

SUBSTRING

Creates a new string starting from a fixed number of characters into the original string.

Syntax:

```
SUBSTRING (character_expression FROM starting_position)
```

where:

character_expression Any expression that evaluates to a character string.

starting_position   A positive integer that indicates the starting position within the first character string.

Example:

```
SUBSTRING ('ABCDEF' FROM 3)
```

Results in:

```
CDEF
```

TRIM

Strips specified leading and/or trailing characters from a character string.

Syntax:

```
TRIM (type 'character' FROM character_expression)
```

where:

type	LEADING	Strips specified leading characters from a character string.
	TRAILING	Strips specified trailing characters from a character string.
	BOTH	Strips specified characters, both leading and trailing, from a character string.
character		Any single character. If the character part of the specification and the single quotes are omitted, a space character is used as a default.
character_expression		Any expression that evaluates to a character string.

NOTE: The syntax TRIM (character_expression) is also valid. This trims all leading and trailing spaces.

UPPER

Converts a character string to uppercase.

Syntax:

UPPER (character_expression)

where:

character_expression   Any expression that evaluates to a character string.

Math Functions

The math functions perform mathematical operations.

Abs

Calculates the absolute value of a numerical expression.

Syntax:

ABS (n_expression)

where:

n_expression   Any expression that evaluates to a numerical value.

Acos

Calculates the arc cosine of a numerical expression.

Syntax:

    ACOS (n_expression)

where:

n_expression   Any expression that evaluates to a numerical value.

Asin

Calculates the arc sine of a numerical expression.

Syntax:

    ASIN (n_expression)

where:

n_expression   Any expression that evaluates to a numerical value.

Atan

Calculates the arc tangent of a numerical expression.

Syntax:

    ATAN (n_expression)

where:

n_expression   Any expression that evaluates to a numerical value.

Atan2

Calculates the arc tangent of y/x, where y is the first numerical expression and x is the second numerical expression.

Syntax:

    ATAN2 (n_expression1, n_expression2)

where:

n_expression (1 and 2)   Any expression that evaluates to a numerical value.

Ceiling

Rounds a noninteger numerical expression to the next highest integer. If the numerical expression evaluates to an integer, the Ceiling function returns that integer.

Syntax:

    CEILING (n_expression)

where:

n_expression   Any expression that evaluates to a numerical value.

Cos

Calculates the cosine of a numerical expression.

Syntax:

    COS (n_expression)

where:

n_expression   Any expression that evaluates to a numerical value.

Cot

Calculates the cotangent of a numerical expression.

Syntax:

    COT (n_expression)

where:

n_expression   Any expression that evaluates to a numerical value.

Degrees

Converts an expression from radians to degrees.

Syntax:

    DEGREES (n_expression)

where:

n_expression   Any expression that evaluates to a numerical value.

Exp

Calculates the value e to the power specified.

Syntax:

    EXP (n_expression)

where:

n_expression   Any expression that evaluates to a numerical value.

Floor

Rounds a noninteger numerical expression to the next lowest integer. If the numerical expression evaluates to an integer, the FLOOR function returns that integer.

Syntax:

    FLOOR (n_expression)

where:

n_expression   Any expression that evaluates to a numerical value.

Log

Calculates the natural logarithm of an expression.

Syntax:

    LOG (n_expression)

where:

n_expression   Any expression that evaluates to a numerical value.

Log10

Calculates the base 10 logarithm of an expression.

Syntax:

    LOG10 (n_expression)

where:

n_expression   Any expression that evaluates to a numerical value.

Mod

Divides the first numerical expression by the second numerical expression and returns the remainder portion of the quotient.

Syntax:

    MOD (n_expression1, n_expression2)

where:

n_expression (1 and 2)   Any expression that evaluates to a numerical value.

Pi

Returns the constant value of pi (the circumference of a circle divided by the diameter of a circle).

Syntax:

    PI ()

Power

Takes the first numerical expression and raises it to the power specified in the second numerical expression.

Syntax:

    POWER(n_expression1, n_expression2)

where:

n_expression (1 and 2)   Any expression that evaluates to a numerical value.

Radians

Converts an expression from degrees to radians.

Syntax:

    RADIANS (n_expression)

where:

n_expression   Any expression that evaluates to a numerical value.

Rand

Returns a pseudo-random number between 0 and 1.

Syntax:

```
RAND()
```

RandFromSeed

Returns a pseudo-random number based on a seed value. For a given seed value, the same set of random numbers are generated.

Syntax:

```
RAND (n_expression)
```

where:

n_expression   Any expression that evaluates to a numerical value.

Round

Rounds a numerical expression to n digits of precision.

Syntax:

```
ROUND (n_expression, n)
```

where:

n_expression   Any expression that evaluates to a numerical value.

n   Any positive integer representing the number of digits of precision (that is, the number of decimal places) to which to round.

Example:

```
ROUND (12.358, 2)
```

Returns:

```
12.36
```

Sign

Returns a value of 1 if the numerical expression argument evaluates to a positive number, a value of -1 if the numerical expression argument evaluates to a negative number, and 0 if the numerical expression argument evaluates to zero.

Syntax:

    SIGN (n_expression)

where:

n_expression   Any expression that evaluates to a numerical value.

Sin

Calculates the sine of a numerical expression.

Syntax:

    SIN (n_expression)

where:

n_expression   Any expression that evaluates to a numerical value.

Sqrt

Calculates the square root of the numerical expression argument. The numerical expression has to evaluate to a nonnegative number.

Syntax:

    SQRT (n_expression)

where:

n_expression   Any expression that evaluates to a nonnegative numerical value.

Tan

Calculates the tangent of a numerical expression.

Syntax:

    TAN (n_expression)

where:

n_expression   Any expression that evaluates to a numerical value.

Truncate

Truncates a decimal number to return a specified number of decimal places.

Syntax:

TRUNCATE (n_expression, n)

where:

n_expression   Any expression that evaluates to a numerical value.

n   Any positive integer representing the number of decimal places that are returned.

Example:

TRUNCATE (12.358, 2)

Returns:

12.35

Calendar Date/Time Functions

The calendar date/time functions manipulate data in data types for date, time and timestamp. (The timestamp data type is a combination of date and time.)

All date-functions are ISO 8601 compliant. This particularly affects functions such as Week_Of_Year and Week_Of_Quarter where the initial week of the year is the first full week that includes a Thursday. For detailed information on how date functions are calculated, consult the ISO 8601 standard.

Current_Date

Returns the current date. The date is determined by the system in which Oracle CRM On Demand Answers is running. The value does not contain a time component.

Syntax:

CURRENT_DATE

Current_Time

Returns the current time. The time is determined by the system in which Oracle CRM On Demand Answers is running. The value does not contain a date component.

Note: This function obtains the current time at the time the report is run. Using this function with an analytics subject area prevents the report from caching, which decreases performance.

Syntax:

CURRENT_TIME (n)

where:

n   Any integer representing the number of digits of precision with which to display the fractional second. The argument is optional; the function returns the default precision when no argument is specified.

Current_TimeStamp

Returns the current date/timestamp. The timestamp is determined by the system in which Oracle CRM On Demand Answers is running.

Note: This function obtains the current time at the time the report is run. Using this function with an analytics subject area prevents the report from caching, which decreases performance.

Syntax:

    CURRENT_TIMESTAMP (n)

where:

n   Any integer representing the number of digits of precision with which to display the fractional second. The argument is optional; the function returns the default precision when no argument is specified.

Day_Of_Quarter

Returns a number (between 1 and 92) corresponding to the day of the quarter for the specified date.

Syntax:

    DAY_OF_QUARTER (date_expression)

where:

date_expression   Any expression that evaluates to a date.

DayName

Returns the name of the day of the week (in English) for a specified date.

Syntax:

DAYNAME (date_expression)

where:

date_expression   Any expression that evaluates to a date.

DayOfMonth

Returns the number corresponding to the day of the month for a specified date.

Syntax:

    DAYOFMONTH (date_expression)

where:

date_expression   Any expression that evaluates to a date.

DayOfWeek

Returns a number between 1 and 7, corresponding to the day of the week, for a specified date. The number 1 corresponds to Sunday, and the number 7 corresponds to Saturday.

Syntax:

DAYOFWEEK (date_expression)

where:

date_expression   Any expression that evaluates to a date.

DayOfYear

Returns the number (between 1 and 366) corresponding to the day of the year for a specified date.

Syntax:

DAYOFYEAR (date_expression)

where:

date_expression   Any expression that evaluates to a date.

Hour

Returns a number (between 0 and 23) corresponding to the hour for a specified time. For example, 0 corresponds to 12 a.m. and 23 corresponds to 11 p.m.

Syntax:

    HOUR (time_expression)

where:

time_expression   Any expression that evaluates to a time.

Minute

Returns a number (between 0 and 59) corresponding to the minute for a specified time.

Syntax:

    MINUTE (time_expression)

where:

time_expression   Any expression that evaluates to a time.

Month

Returns the number (between 1 and 12) corresponding to the month for a specified date.

Syntax:

    MONTH (date_expression)

where:

date_expression   Any expression that evaluates to a date.

Month_Of_Quarter

Returns the number (between 1 and 3) corresponding to the month in the quarter for a specified date.

Syntax:

    MONTH_OF_QUARTER (date_expression)

where:

date_expression   Any expression that evaluates to a date.

MonthName

Returns the name of the month (in English) for a specified date.

Syntax:

    MONTHNAME (date_expression)

where:

date_expression   Any expression that evaluates to a date.

Now

Returns the current timestamp. The NOW function is equivalent to the CURRENT_TIMESTAMP function.

Note: This function obtains the current time at the time the report is run. Using this function with an analytics subject area prevents the report from caching, which decreases performance.

Syntax:

```
NOW ()
```

Quarter_Of_Year

Returns the number (between 1 and 4) corresponding to the quarter of the year for a specified date.

Syntax:

```
QUARTER_OF_YEAR (date_expression)
```

where:

date_expression   Any expression that evaluates to a date.

Second

Returns the number (between 0 and 59) corresponding to the seconds for a specified time.

Syntax:

```
SECOND (time_expression)
```

where:

time_expression   Any expression that evaluates to a time.

TimestampAdd

The TimestampAdd function adds a specified number of intervals to a specified timestamp. A single timestamp is returned.

Syntax:

```
TimestampAdd (interval, integer_expression, timestamp_expression)
```

where:

interval	The specified interval. Valid values are:
	SQL_TSI_SECOND
	SQL_TSI_MINUTE
	SQL_TSI_HOUR
	SQL_TSI_DAY
	SQL_TSI_WEEK
	SQL_TSI_MONTH
	SQL_TSI_QUARTER
	SQL_TSI_YEAR
integer_expression	Any expression that evaluates to an integer. This is the number of intervals to be added.
timestamp_expression	The timestamp used as the base in the calculation.

A null integer-expression or a null timestamp-expression passed to this function will result in a null return value.

In the simplest scenario, this function merely adds the specified integer value (integer_expression) to the appropriate component of the timestamp, based on the interval. Adding a week translates to adding seven days, and adding a quarter translates to adding three months. A negative integer value results in a subtraction (going back in time).

An overflow of the specified component (such as more than 60 seconds, 24 hours, twelve months and so on) necessitates adding an appropriate amount to the next component. For example, when adding to the day component of a timestamp, this function considers overflow and takes into account the number of days in a particular month (including leap years when February has 29 days).

When adding to the month component of a timestamp, this function verifies that the resulting timestamp has a sufficient number of days for the day component. For example, adding 1 month to 2000-05-31 does not result in 2000-06-31 because June does not have 31 days. This function reduces the day component to the last day of the month, 2000-06-30 in this example.

A similar issue arises when adding to the year component of a timestamp having a month component of February and a day component of 29 (that is, last day of February in a leap year). If the resulting timestamp does not fall on a leap year, the function reduces the day component to 28.

The following are examples of the TimestampAdd function:

The following code example asks for the resulting timestamp when 3 days are added to 2000-02-27 14:30:00. Because February, 2000 is a leap year, this returns a single timestamp of 2000-03-01 14:30:00.

```
TimestampAdd(SQL_TSI_DAY, 3, TIMESTAMP'2000-02-27 14:30:00')
```

The following code example asks for the resulting timestamp when 7 months are added to 1999-07-31 0:0:0. This returns a single timestamp of 2000-02-29 00:00:00. Notice the reduction of day component to 29 because of the shorter month of February.

```
TimestampAdd(SQL_TSI_MONTH, 7, TIMESTAMP'1999-07-31 00:00:00')
```

The following code example asks for the resulting timestamp when 25 minutes are added to 2000-07-31 23:35:00. This returns a single timestamp of 2000-08-01 00:00:00. Notice the propagation of overflow through the month component.

```
TimestampAdd(SQL_TSI_MINUTE, 25, TIMESTAMP'2000-07-31 23:35:00')
```

TimeStampDiff

The TimestampDiff function returns the total number of specified intervals between two timestamps.

Syntax:

```
TimestampDiff (interval, timestamp_expression1, timestamp_expression2)
```

where:

interval	The specified interval. Valid values are:
	SQL_TSI_SECOND
	SQL_TSI_MINUTE
	SQL_TSI_HOUR
	SQL_TSI_DAY
	SQL_TSI_WEEK
	SQL_TSI_MONTH
	SQL_TSI_QUARTER
	SQL_TSI_YEAR
timestamp_expression1	The timestamp to be subtracted from the second timestamp.
timestamp_expression2	The second timestamp. timestamp_expression1 is subtracted from this timestamp to determine the difference.

A null timestamp-expression parameter passed to this function will result in a null return value.

This function first determines the timestamp component that corresponds to the specified interval parameter. For example, SQL_TSI_DAY corresponds to the day component and SQL_TSI_MONTH corresponds to the month component.

The function then looks at the higher order components of both timestamps to calculate the total number of intervals for each timestamp. For example, if the specified interval corresponds to the month component, the function calculates the total number of months for each timestamp by adding the month component and twelve times the year component.

Finally, the function subtracts the first timestamp's total number of intervals from the second timestamp{\f2 '}s total number of intervals.

When calculating the difference in days, the function truncates the time values from both Timestamp expressions and then subtracts the date values.

When calculating the difference in weeks, the function calculates the difference in days and divides by seven before rounding.

When calculating the difference in quarters, the function calculates the difference in months and divides by three before rounding.

When calculating the difference in years, the function calculates the difference in months and divides by twelve before rounding.

TimestampDiff Function and Results Example

The following code example asks for a difference in days between timestamps 1998-07-31 23:35:00 and 2000-04-01 14:24:00. It returns a value of 610. Notice that the leap year in 2000 results in an additional day.

    TimestampDIFF(SQL_TSI_DAY, TIMESTAMP'1998-07-31 23:35:00', TIMESTAMP'2000-04-01 14:24:00')

Week_Of_Quarter

Returns a number (between 1 and 13) corresponding to the week of the quarter for the specified date.

Syntax:

    WEEK_OF_QUARTER (date_expression)

where:

date_expression   Any expression that evaluates to a date.

Week_Of_Year

Returns a number (between 1 and 53) corresponding to the week of the year for the specified date.

Syntax:

    WEEK_OF_YEAR (date_expression)

where:

date_expression   Any expression that evaluates to a date.

Year

Returns the year for the specified date.

Syntax:

```
YEAR (date_expression)
```

where:

date_expression   Any expression that evaluates to a date.

Example:

```
YEAR (CURRENT_DATE)
```

Conversion Functions

The conversion functions convert a value from one form to another.

Cast

Changes the data type of either a value or a null value to another data type. This change is required before using values of one data type in a function or operation that expects another data type.

Syntax:

```
CAST (expression|NULL AS datatype)
```

The supported data types to which the value can be changed are the following:

```
CHARACTER, VARCHAR, INTEGER, FLOAT, SMALLINT, DOUBLE PRECISION, DATE, TIME, TIMESTAMP, BIT,
BIT VARYING
```

Depending on the source data type, some destination types are not supported. For example, if the source data type is a BIT string, the destination data type has to be a character string or another BIT string.

Example:

The following first changes (CASTs) Annual Revenues to an INTEGER to remove the decimal places, and then to a CHARACTER so that it can be concatenated with a character literal (the text 'K'):

```
CAST ( CAST ( Account. "Account Revenue"/1000 AS INTEGER ) AS CHARACTER ) ||' K'
```

If you use the CAST function, then the CAST function might return an extra space at the end of the value, for example: CAST(YEAR("Date Created".Date) as char) || '*'   returns "2012 *"

You can avoid this problem by specifying the length of the return value, for example:

```
CAST(YEAR("Date Created".Date) as char(4)))
```

IfNull

Tests if an expression evaluates to a null value, and if it does, assigns the specified value to the expression.

Syntax:

```
IFNULL (expression, value)
```

ValueOf( )

Use the VALUEOF function in an expression builder or filter to reference the value of a session variable defined in Oracle CRM On Demand Answers. For more information, see Session Variables (on page 1285).

Session variables should be used as arguments of the VALUEOF function. Refer to session variables by name.

Example:

To use the value of a session variable named NQ_SESSION.CURRENT_YEAR:

```
CASE WHEN "Year" > VALUEOF(NQ_SESSION.CURRENT_YEAR) THEN 'Future' WHEN ... ELSE...END
```

You must refer to a session variable by its fully qualified name.

System Functions

The system functions return values relating to the session.

User

Returns the current Oracle CRM On Demand user's information.

If the user was created in Oracle CRM On Demand Release 18 or earlier, the user information is the User ID, which is unique to each user.

If the user was created in Oracle CRM On Demand Release 19 or later, the user information is the user record row ID. To acquire the User ID, use the VALUEOF function and the session variable REPLUSER as follows:

```
VALUEOF(NQ_SESSION.REPLUSER)
```

Syntax:

```
USER ()
```

Operators

Operators are used to combine expression elements to make certain types of comparisons in an expression.

Operator	Function in an Expression
+	Plus sign for addition.
-	Minus sign for subtraction
*	Multiply sign for multiplication
/	Divide by sign for division
||	Character string concatenation

Operator	Function in an Expression
(	Open parenthesis, for grouping operations
)	Close parenthesis, for grouping operations
>	Greater than sign, indicating values higher than the comparison
<	Less than sign, indicating values lower than the comparison
=	Equal sign, indicating the same value
<=	Less than or equal to sign, indicating values the same or lower than the comparison
>=	Greater than or equal to sign, indicating values the same or higher than the comparison
<>	Not equal to, indicating values higher or lower, but not the same
AND	AND connective, indicating intersection with one or more conditions to form a compound condition
OR	OR connective, indicating the union with one or more conditions to form a compound condition
NOT	NOT connective, indicating a condition is not met
,	Comma, used to separate elements in a list

Case Statements

Case statements are building blocks for creating conditional expressions that can produce different results for different column values.

Case (Switch)

This form of the Case statement is also referred to as the CASE (Lookup) form. The value of expression1 is examined, then the WHEN expressions. If expression1 matches any WHEN expression, it assigns the value in the corresponding THEN expression.

If expression1 matches an expression in more than one WHEN clause, only the expression following the first match is assigned.

If none of the WHEN expressions match, it assigns the value specified in the ELSE expression. If no ELSE expression is specified, it assigns the value NULL.

Refer also to the Case (If) statement.

Syntax:

```
CASE expression1

    WHEN expression THEN expression

    {WHEN expression... THEN expression...}

    ELSE expression

END
```

Where:

CASE

Starts the CASE statement. Must be followed by an expression and one or more WHEN and THEN statements, an optional ELSE statement, and the END keyword.

WHEN

Specifies the condition to be satisfied.

THEN

Specifies the value to assign if the corresponding WHEN expression is satisfied.

ELSE

Specifies the value to assign if none of the WHEN conditions are satisfied. If omitted, ELSE NULL is assumed.

END

Ends the CASE statement.

Example

```
CASE Score-par

    WHEN -5 THEN 'Birdie on Par 6'

    WHEN -4 THEN 'Must be Tiger'

    WHEN -3 THEN 'Three under par'

    WHEN -2 THEN 'Two under par'

    WHEN -1 THEN 'Birdie'

    WHEN 0 THEN 'Par'

    WHEN 1 THEN 'Bogey'

    WHEN 2 THEN 'Double Bogey'

    ELSE 'Triple Bogey or Worse'

END
```

In the above example, the WHEN statements must reflect a strict equality; a WHEN condition of

```
WHEN < 0 THEN 'Under Par'
```

is illegal because comparison operators are not allowed.

Case (If)

This form of the Case statement evaluates each WHEN condition and if satisfied, assigns the value in the corresponding THEN expression.

If none of the WHEN conditions are satisfied, it assigns the default value specified in the ELSE expression. If no ELSE expression is specified, it assigns the value NULL.

Refer also to the Case (Switch) statement.

Syntax:

```
CASE

    WHEN request_condition1 THEN expression1

    {WHEN request_condition2 THEN expression2}

    {WHEN request_condition... THEN expression...}

    ELSE expression

END
```

Where:

CASE

Starts the CASE statement. Must be followed by one or more WHEN and THEN statements, an optional ELSE statement, and the END keyword.

WHEN

Specifies the condition to be satisfied.

THEN

The value to assign if the corresponding WHEN expression is satisfied.

ELSE

Specifies the value if none of the WHEN conditions are satisfied. If omitted, ELSE NULL is assumed.

END

Ends the CASE statement.

Example

```
CASE

    WHEN score-par < 0 THEN 'Under Par'

    WHEN score-par = 0 THEN 'Par'

    WHEN score-par = 1 THEN 'Bogie'

    WHEN score-par = 2 THEN 'Double Bogey'

    ELSE 'Triple Bogey or Worse'
```

```
END
```

Unlike the Switch form of the CASE statement, the WHEN statements in the If form allow comparison operators; a WHEN condition of

```
WHEN < 0 THEN 'Under Par'
```

is legal.

Session Variables

Session variables hold predefined values for a user and are initialised when a user logs in to Oracle CRM On Demand. When session variables are initialised, they remain unchanged for the duration of the session. Session variables are private values for a user and each instance of a session variable can be initialised with a different value for different users. You can reference them in the following areas: Title views, Narrative views, Column Filters, Column Formulas, Dashboard Prompts and so on.

The most common use of a session variable is to reference it in a column filter condition of a report where you want to dynamically limit the results. The limit is based on the value of a session variable, such as the current fiscal year and month.

A session variable is referenced using the syntax NQ_SESSION.{Variable Name}. To use it in a column formula, it is referenced using the syntax VALUEOF(NQ_SESSION.Variable Name).

CURRENT_DT	Current date and time.
COMPANY_LANG	Company's default language.
COMPANY_TIMEZONE	Company's default time zone.
COMPANY_TMPLT_COUNTRY	Company's default country.
CONTEXT_ID	ID of currently selected custom book or user in the Book selector.
CURRENT_MONTH	Current fiscal month of the session for the user. The values range from 1 to 12.
CURRENT_QTR	Current fiscal quarter of the session for the user. The values range from 1 to 4.
CURRENT_YEAR	Current fiscal year of the session for the user. A four-digit value, for example: 2011.
DISPLAYNAME	Current user's name.
INC_SUBITEM	Currently selected value of Include Sub-Items check box in the Book selector.
LAST_QTR	Previous quarter.
LAST_QTR_YEAR	Year of the previous quarter.

LAST_YEAR	Previous year.
NEXT_QTR	Next quarter.
NEXT_QTR_YEAR	Year of the next quarter.
NEXT_YEAR	Next year.
QAGO	Date (full date prefixed with fiscal calendar definition code) a quarter ago.
QTR_BEFORE_LAST	Two quarters ago.
QTR_BEFORE_LAST_YEAR	Year of two quarters ago.
REPLUSER	Current user's login ID.
SERVER_COMPANY_TIMEZONE_OFFSET	The offset (in minutes) between the server timestamp and company default timestamp. The value of this variable is set when you log in. The variable is not updated during your session.
USER_ALIAS	Current user's alias.
USER_BUSINESS_UNIT	Current user's business unit
USER_BUSINESS_UNIT_LEVEL_1	Level 1 business unit in user's business unit hierarchy
USER_BUSINESS_UNIT_LEVEL_2	Level 2 business unit in user's business unit hierarchy
USER_BUSINESS_UNIT_LEVEL_3	Level 3 business unit in user's business unit hierarchy
USER_BUSINESS_UNIT_LEVEL_4	Level 4 business unit in user's business unit hierarchy
USER_COMPANY_CURCY	Company's default currency.
USER_COMPANY_TIMEZONE_OFFSET	The offset (in minutes) between the user timestamp and company default timestamp. The value of this variable is set when you log in. The variable is not updated during your session.
USER_COUNTRY	Current user's country
USER_DEFAULT_CURCY	User's default currency.
USER_DEPARTMENT	Current user's department
USER_DIVISION	Current user's division
USER_FISCAL_CALENDAR	First month of the current user's fiscal year.

USER_ID	Current user's unique system ID
USER_MANAGER_ALIAS	Current user's manager alias
USER_LANG	User's default language.
USER_REGION	Current user's region
USER_REPORTS_TO	Current user's manager
USER_ROLE	Current user's role
USER_SERVER_TIMEZONE_OFFSET	The offset (in minutes) between the user timestamp and server timestamp. The value of this variable is set when you log in. It is not updated during your session..
USER_SUBREGION	Current user's subregion
USER_TIMESTAMP	The timestamp of the user based on the timezone the setting defined in the user profile. The value of this variable is set when you log in. The variable is not updated during your session.
USER_TIMEZONE	The timezone description as defined in your user profile. The value of this variable is set when you log in. The variable is not updated during your session.
YAGO	Date (full date prefixed with fiscal calendar definition code) a year ago.
YEAR_MINUS_THREE	Three years ago.
YEAR_MINUS_TWO	Two years ago.
YEAR_PLUS_TWO	Two years from now.

About Report Performance

Report performance is a concern for companies with large volumes of data and users. The larger and more sophisticated your reporting needs become, the more important the report performance is to you. Understanding how Oracle CRM On Demand Answers efficiently compensates and processes data with caching and during different times helps you to build reports with the best performance possible.

This topic describes the in-built caching mechanism enabling fast response time as well as the expected performance during the nightly refresh and when using reporting subject areas instead of analytic subject areas. For more information about report performance, see Optimising Performance (see "Optimizing Performance" on page 1288).

About Caching

When reports and queries are run using analytic subject areas, the query results are cached. The query cache allows Oracle CRM On Demand Answers to satisfy subsequent query requests faster without having to go back to the database. This reduction allows a faster, query-response time. In addition to a faster, query-response time, this feature conserves network resources and eliminates costly database processing. Queries do not have to be identical to take advantage of this query caching. Even a subset of a previously run query with a filter condition or the same query with less columns can use the cache generated by a previous query. Data visibility is fully respected with query caching. Because the database is updated during the incremental refresh, the query cache is purged and repopulated when a new set of queries are run subsequently.

Query caching is supported only for reports and queries using analytic subject areas. Real-time reports and queries are not enabled with query cache. However, both real-time and historical reports and queries use a Web server cache. The Web server cache is not the same as the query cache supported by Oracle CRM On Demand Answers. The Web server cache for real-time and historical queries exists for at least for 10 minutes after being created or used, but it is purged after 60 minutes. Some queries might be purged sooner than 60 minutes, depending on the number of requests being run.

Analytic (Historical) Reports Compared to Reporting (Real-Time) Reports

Queries run using analytic (historical) subject areas are comparatively faster than queries run using reporting (real-time) subject areas. The analytic subject areas use a specialised data warehouse that is designed and optimised exclusively for analysis and reporting. However, the real-time subject areas use the database that is optimised to support the transactional activities where a low volume of records are read, written, updated extremely fast. So, when real-time subject areas are used, queries have to compete for database resources that also have to cater to the needs of transaction updates of Oracle CRM On Demand affecting the performance of both Oracle CRM On Demand and real-time queries. Due to the need to support the reporting of most current data, the real-time subject areas are not enabled with query caching, which further reduces query-performance problems even for identical queries.

Use real-time subject areas only when it is critical to get the most up-to-the-minute data, or when the historical subject areas do not meet your reporting needs.

Report Performance During the Nightly Refresh

Real-time report query performance is somewhat affected during the nightly refresh process, because the data that is being retrieved to satisfy the request is also being read by the nightly refresh process to populate the data warehouse that drives the historical subject areas. However, the performance of historical report queries is not affected during the nightly refresh process, because a snapshot of the data warehouse is taken at the start of the nightly refresh, and users are directed to that replicated copy. Upon completion of the nightly refresh, users are redirected to the refreshed data warehouse automatically. This feature is transparent to users.

Optimizing Performance

Every time you access a report or analysis, your data is retrieved from the database, processed by the reporting server and displayed on the page. The more complex the analysis, the more time it can take to query the database to retrieve and present the data. This topic contains guidelines to help you create reports that display as quickly as possible.

Before you begin. Do the following:

- Review the prebuilt reports available in Oracle CRM On Demand. These reports might address most of your reporting needs.

- Take training courses.

- Gather your reporting requirements and have them approved by the stakeholders.

- Check your browser settings to make sure the browser client is properly configured for performance.

- Understand report performance. For more information, see About Report Performance (on page 1287).

About Subject Areas

You can use the two subject area types depending on your reporting and business needs.

The Analytics subject areas should be used whenever possible to build reports. These subject areas are built using a specially constructed data warehouse that is tuned for better query performance queries. The data warehouse used for Analytics subject areas is refreshed daily and reports built using these subject areas display results faster than Reporting subject areas even for large and complex queries.

The Reporting subject areas are built using the same database in which all other user transactions in the application occur, and hence, compete for same resources that your application depends on when data is retrieved for reports.

Guidelines for Using a Reporting Subject Area

If you are using a Reporting subject area, follow these guidelines:

- When possible, use fields from the Address (Extended) folders.

- When possible, minimise the use of the following:

  - Custom picklist fields.

  - Fields from any Owned By User folder. Instead, use the Owner field.

  - Fields from the Primary Contact folder within the Account folder.

  - CAST functions for Date or Date/Time fields.

  - Parent Account, Last Modified By, Created By, and Manager fields.

  - Fields from Date-type folders, such as Date Created and Date Closed folders.

    Although these folders provide a convenient way to group the date attribute to week, month, quarter, or year, using them also makes the query more complex and may affect the report performance. If experiencing performance problems with fields from the date folders, try using the Date or Date/Time fields from the primary record type folder. For example, open the Opportunity subject area, and select the Close Date field in the Opportunities folder instead of a field from the Close Date folder.

Guidelines for Improving Performance

Follow these guidelines to improve performance:

Build Reports Incrementally

Do the following:

- Start small, and test the report as you build it. Begin with a few fields, and test them before adding more columns.

- Test your filters to determine the best sequence to use.

  Different sequences can increase or decrease performance, but only trial-and-error helps you determine this.

Minimise the Use of Record Types That Cross Fields or Columns

Follow these guidelines:

- **Columns**. When you select columns from more than one record type for your analysis, you are adding complexity to the data query. This complexity can affect the speed of displaying results. So, consider this when including cross-record type fields in a report.

- **Column Selectors.** Keep all column selectors within the same record type. Whenever possible, do not use a column selector that crosses to another record type.

- **Prompts.** Try to make all prompts reference fields within the same record type folder.

Use Indexed Fields

Do the following:

- Use indexed field to filter data in real-time reports.

  Indexed fields are optimised so your report results appear more quickly.

- Plan ahead when you set up your data to make sure that the correct data is stored in the indexed fields.

  Following this practice allows you to build reports that use the indexed fields, incorporating them at the best possible places. Oracle CRM On Demand also has a limited number of indexed custom fields. The number varies according to the field type and record type.

Limit the Organisational Hierarchy to Five Levels

The higher a user is in the organisational hierarchy, the more data is returned and the slower the report runs. Therefore, limit the hierarchy to a maximum of five levels.

Use Filters

Using filters restricts the amount of data that is returned when you access an analysis. Filtering can increase the speed of running your report.

- Apply filters as a first step to building a report. If your company has a lot of data do not run the first preview of a report until you first apply filters.

- Filter your driving record type as a priority. For example, when using an Activities subject area, filter Activities.

- Choose the most restrictive filters first, and then, after experimenting, ease restrictions as needed.

However, consider these guidelines when adding filters:

■ If a filter references a column with an underlying CASE formula, this filter might adversely affect reporting performance, depending on the formula and the related processing required. When filtering a field with a CASE statement or other formula, experiment to determine how this filtering affects reporting performance.

■ Before using a CASE formula, ask yourself these questions:

   ■ Can this classification be performed in Oracle CRM On Demand using the Workflow feature?

   ■ Does the classification code appear in other reports? If so, then consider creating a new column and building a workflow to populate it.

■ A report that filters a custom Date field can run more quickly than a similar report that filters a custom Date and Time field, because all Date and Time fields involve converting time zones, which affects reporting performance. Therefore, when possible, filter custom Date fields rather than custom Date and Time fields.

■ Avoid using an OR clause on different record types or columns (for example, where SR.Type = 'A' OR SR.Priority = 'High' OR Account.Industry = 'Medical'). Instead, try the following:

   ■ Remove the OR clause, and perform further classification in the pivot table.

   ■ Break the report in to multiple, smaller reports, and merge the result using the combined analytics.

Follow the Guidelines for Defining Prompts

You can define prompts for your report in Step 3 of the Build and View Analysis page in Oracle CRM On Demand. These prompts allow those users who access the finished report to make selections to limit the data in the report. When running a report that uses prompts, a user's experience is affected by the prompt-processing time and by the report-processing time.

If you add prompts to your report, do the following:

■ Minimise the number of prompts used for a report.

■ Avoid using high-resolution images for Image prompts. It is recommended that you do not use an image on a report that exceeds 100 dots per inch (dpi). For best performance, use images of 50 dpi or lower.

■ When defining prompts, under the What Values Should Be Shown to the User menu, choose either None or All Values for the fastest performance. Avoid using the Filter Limited Values option. This option restricts the prompt selections that the report displays. The restriction is based on other filters and prompts that are applied to the report. If a report contains large volumes of data, this option can slow reporting performance.

   When deciding whether to select the None, All Values, or Filter Limited Values option, it is recommended that you strike a balance between the level of reporting performance that you want and the optimal presentation of selectable values to users.

Provide Drilldown Links to Detail Reports

Instead of creating a report that presents a long list of data tables, charts, and graphs, do the following:

■ Design an initial report to show the summary information or trends, and let the user drill down on the details.

■ Build reports for more detailed information by targeting data from the first report. Then, provide drilldown links to the summary report.

The following procedure describes how to link reports to tables.

To link reports to tables

1 Click the Format Column icon to open the Column Properties dialog box.

2 Click the Column Format tab.

3 In the Value Interaction Type drop-down list, choose Navigate.

4 In the Navigate to Another Analysis field, browse for a detailed report that you want to drill down on, and then click OK.

The following procedure describes how to link reports to charts.

To link reports to charts

1 Click the Additional Charting Options icon on the Chart Edit page (under the Analysis: Report Title bar, on the left side of the page).

2 Click the Interaction tab.

3 Select Navigate and browse for a detailed report to drill down on from the chart.

Limit the Number of Set Operations

Advanced features allow you to combine queries. You can then perform set operations, such as unions, intersections, and other joining actions on those queries to build a final report. The greater the number of query results combined, the more processing time is required to run the final report. For fastest processing, limit the number of set operations to no more than three.

Clarify HTML Code and Narratives

When using HTML in connection with SQL, do the following:

■ Make sure that the HTML is clear and precise and does not contain any unnecessary tags or superfluous information.

■ Make sure the narratives are clear and precise and do not contain unnecessary instructions.

Precise narratives make the specified formatting more efficient and reduce performance issues.

Remove Columns in Pivot Tables

Pivot tables allow you to show the report in multiple views without writing multiple reports, but they also might affect performance. Whenever possible, remove the columns from the report criteria (in Step 1 – Define Criteria) that are not used in the pivot table itself.

Use Chart Pivoted Results

Whenever possible, for each pivot table that requires a chart, use the Chart Pivoted Results option instead of creating a separate chart view. Multiple charts in a report can require more processing, because Oracle CRM On Demand must create the charts individually, rather than simultaneously with the pivot table.

Ensure that Reports Are Scalable

Reports might run well in a test before all of your production data has been imported. After all the production data has been imported, the increased data volume adversely affects reporting performance. If you are in the process of implementing Oracle CRM On Demand, allow time to retest and tune reports after all the production data has been imported.

Use Optimised Code and UTC Fields in Filters

Many reporting subject areas include special fields in their dimensions that are optimised to reduce the query time when they are used in filters. Optimised fields end with the words *Code* or *UTC.* For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimised version of the Account Type field. Both optimised and nonoptimised fields produce the same results in reports, but using the optimised field in the filter generates faster queries. This method is faster than using the nonoptimised field. Using these fields in filter conditions reduces additional table joins and avoids timestamp conversions that are based on your company's time zone.

Note: These optimised fields support language translations for all supported languages, but they do not support record type renaming.

To determine if optimised filtering fields exist for a specific reporting subject area, see the online help for that subject area, and look for the heading *Optimised Filtering Fields.*

16 Dashboards

The Dashboard Homepage shows a list of the dashboards that are available to you. Dashboards can display saved requests, images, charts, tables, text from Oracle CRM On Demand Answers, and links to Web sites and documents. A *dashboard* consists of one or more pages, which appear as tabs across the top of the dashboard.

Oracle CRM On Demand provides prebuilt dashboards. In addition, users who have the Manage Dashboards privilege in their role can create interactive dashboards that provide customised views of corporate and external information. If your role has this privilege, you can use the Dashboard Editor in Oracle CRM On Demand Answers to add content to an interactive dashboard by dragging and dropping the content from a selection pane to the dashboard layout page. The layout page consists of columns to align the content; each column contains sections that hold the content. The appearance of a dashboard, such as the background colours and the size of text, is controlled by styles. You can also change the dashboard appearance, using the cosmetic formatting dialog box.

While viewing dashboards you can also:

■ Change the dashboard order. For more information, see Changing the Dashboard Order (on page 1319).

■ Manage Dashboards, including changing visibility to dashboards. For more information, see Managing Dashboards (on page 1297).

NOTE: You cannot change the prebuilt dashboards provided in Oracle CRM On Demand, but you can hide them. For more information, see Displaying Dashboards (on page 1318).

Interactive dashboards can contain three types of content:

■ Dashboard objects

■ Content that is saved in the Oracle CRM On Demand Presentation Catalogue

■ Views of folders in the Oracle CRM On Demand Presentation Catalogue

Restrictions That Apply When Creating or Viewing Dashboards

When creating or viewing interactive dashboards, note the following restrictions:

■ A user who creates or edits an interactive dashboard can add any reports to the dashboard to which he or she has access.

The reports are stored in folders. Access to these folders is determined by user roles. The Manage Dashboard privilege allows users to create and edit interactive dashboards. It does not include the Manage Custom Reports privilege. The Manage Custom Reports privilege provides full access to all report subfolders and reports under the Company Wide Shared Folder. For more information about folder visibility, see the Reports (on page 907) and Setting Up User Visibility to Shared Report Folders (on page 923) topics.

■ The reports that are added to the interactive dashboards might not be visible to all users in the company. Access to reports depends on the user role.

  If a user's role does not allow the user to view a certain report on a dashboard, then an error message is displayed on the dashboard.

■ If a report is deleted after it has been added to a dashboard, a user editing the dashboard sees an exclamation mark (!) beside the report name in the Dashboard Editor. If a user is viewing the dashboard, then an error message is displayed.

■ The periods in your reports might be based on your company's fiscal calendar, which might differ from a standard calendar. For example, your company's fiscal year might begin on June 1 of each calendar year. If your company has recently changed its fiscal calendar year in Oracle CRM On Demand, then review historical analyses with caution if they span multiple years. If data in your reports is based on your previous fiscal calendar, then it cannot be aligned with data using a new fiscal calendar.

The following table describes the terms in the Dashboard Editor in Oracle CRM On Demand Answers.

Term	Definition
Columns	Columns are used to align the content on a dashboard. The sections within columns hold the content. You can create as many columns on a dashboard page as you want. Every new dashboard page automatically contains one empty column with one empty section in it. The columns used in dashboards are not related to the columns used in reports.
Dashboard Objects	Dashboard objects are items that are used only in a dashboard. Examples of dashboard objects are sections that hold content and navigation links.
Folders	Folders are organisational constructs that hold content saved in the Oracle CRM On Demand Presentation Catalogue, such as requests created with Oracle CRM On Demand Answers. A folder is similar to a UNIX directory or a Microsoft Windows folder.
Pages	Pages contain the columns and sections that hold the content of a dashboard. Every dashboard has at least one page. In the Dashboard Editor, pages are identified by tabs across the top of the dashboard. Multiple pages are used to organise content. For example, you might have the following pages: ■ One page to store results from Oracle CRM On Demand Answers, which you refer to every day ■ One page that contains links to the Web sites of your suppliers ■ One page that links to your corporate intranet
Results	Results, also called reports, are the output returned from the Oracle CRM On Demand server. The results match the request criteria specified using Oracle CRM On Demand Answers. The default format for viewing results in a dashboard is to show them in a table. Results can also be shown in other formats, such as charts. You can examine and analyse results, save or print them, or download them to a spreadsheet.
Sections	Sections appear in columns in the dashboard layout. They hold the content that you drag and drop from the selection pane and that you use to organise

Term	Definition
	the content within a column.
Styles	Styles control how dashboards and results are formatted for display, such as the colour of text and links, the font and font size, the borders in tables, the colours and attributes of charts, and so on. Styles are organised into folders that contain cascading style sheets (files with a .css extension), images, and chart templates. You can override some elements in the style sheets, such as the table borders and text size, when formatting results in Oracle CRM On Demand Answers.
Presentation Catalogue	The Oracle CRM On Demand Presentation Catalogue stores the content created using Oracle CRM On Demand Answers. The types of content stored in the Presentation Catalogue include: ■ Requests created with Oracle CRM On Demand Answers ■ Filters that are applied to results ■ Information about dashboards

Related Topics

See the following topics for related information:

- Managing Dashboards (on page 1297)
- Reports (on page 907)

Managing Dashboards

If your role has the Manage Dashboards privilege, you can use the dashboard editor in Oracle CRM On Demand Answers to create and edit interactive dashboards. To manage dashboards, do the following tasks:

- Creating Interactive Dashboards (on page 1298)
- Adding Pages to Interactive Dashboards (on page 1299)
- Adding and Displaying Content on Interactive Dashboard Pages (on page 1300)
- Renaming Dashboard Objects (on page 1311)
- Deleting Dashboard Objects (on page 1311)
- Changing the Properties of Interactive Dashboards (on page 1316)
- Changing PDF and Printing Options on Interactive Dashboards (on page 1312)
- Creating Prompts for Interactive Dashboards (on page 1313)
- Changing the Name or Description of an Interactive Dashboard (on page 1318)
- Displaying Dashboards (on page 1318)
- Changing Dashboard Order (see "Changing the Dashboard Order" on page 1319)

- Managing Dashboard Visibility (on page 1321)
- About Guided Navigation in Interactive Dashboards (on page 1320)
- About Subject Areas in Reports (on page 942)
- Usage Notes on Subject Areas (on page 1322)

Creating Interactive Dashboards

This topic describes how to create a new interactive dashboard.

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To create an interactive dashboard

1 Click the Dashboard tab.

2 On the Dashboard page, click the Manage Dashboards link.

3 On the Manage Dashboards page, click New Dashboard.

4 On the Dashboards Edit page, enter the name and description for the dashboard, then click Save.

   The Manage Dashboards page is displayed again.

5 On the Manage Dashboards page, click the Design link for the dashboard that you created.

6 Click Design Dashboard Content.

   The dashboard editor in Oracle CRM On Demand Answers appears in a separate window, independent of the other Oracle CRM On Demand pages. The name of the new dashboard appears at the top of the page

   NOTE: Newly created dashboards contain one blank page. Dashboards that contain only one page do not display the page name as a tab at the top of the dashboard. Dashboard page names appear at the top of a dashboard only when the dashboard contains multiple pages.

   NOTE: The maximum number of dashboards you can create is 1000. The maximum number of dashboards that can be displayed on the Dashboards drop-down menu is 299.

When you have created your dashboard, you can add content to the dashboard. For information on how to manage dashboard content, control the appearance of dashboards, and add pages to dashboards, see the following topics:

- Adding Pages to Interactive Dashboards (on page 1299)
- Adding and Displaying Content on Interactive Dashboard Pages (on page 1300)
- Changing the Properties of Interactive Dashboards (on page 1316)
- Creating Prompts for Interactive Dashboards (on page 1313)

Navigating to the Dashboard Editor

In the dashboard editor in Oracle CRM On Demand Answers, you can add content to interactive dashboards. You can also control the appearance of the dashboards, and rename and delete objects on them.

NOTE: You cannot change the prebuilt dashboards provided in Oracle CRM On Demand.

This topic describes how to navigate to the dashboard editor to work with existing interactive dashboards. If you want to create a new dashboard, see Creating Interactive Dashboards (on page 1298).

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To navigate to the dashboard editor

1 Click the Dashboard tab.

2 On the Dashboard page, click the Manage Dashboards link.

3 On the Manage Dashboards page, in the record-level menu for the dashboard that you want to edit, select Design.

The dashboard editor in Oracle CRM On Demand Answers appears in a separate window, independent of the other Oracle CRM On Demand pages.

The following procedure explains how to select the dashboard page that you want to work with.

To select a dashboard page

NOTE: If you were already working on a dashboard page, performing this action saves any changes you made to the page that you were working on.

◼ From the Page drop-down list next to the name of the dashboard on the Dashboard Editor page, select the page that you want to edit.

Adding Pages to Interactive Dashboards

You can add pages to an interactive dashboard.

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To add a page to an interactive dashboard

1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see Navigating to the Dashboard Editor (on page 1299).

2 On the Dashboard Editor page, click the Add Dashboard Page icon near the top of the page.

3 Enter a name and a description for the dashboard page.

4 Click OK.

The new page appears on the dashboard.

NOTE: If there is only one page in the dashboard, the page name will not appear on a tab. Tabs appear only when there is more than one page, so you can click the tabs to move between the pages.

Adding and Displaying Content on Interactive Dashboard Pages

The following topics describe how to add and display content on interactive dashboard pages.

NOTE: To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

■ Navigating to the Dashboard Editor (on page 1299)

■ Adding Pages to Interactive Dashboards (on page 1299)

■ Controlling the Appearance of Interactive Dashboard Pages (on page 1301)

■ Making Content Appear Conditionally on Interactive Dashboard Pages (on page 1303)

■ Adding Guided Navigation Links to Interactive Dashboard Pages (on page 1303)

■ Adding Text Links and Image Links to Interactive Dashboard Pages (on page 1304)

■ Adding Views of Presentation Catalogue Folders to Interactive Dashboard Pages (on page 1307)

■ Adding Content Saved in the Presentation Catalogue to Interactive Dashboard Pages (on page 1307)

■ Controlling How Results Display When Users Drill Down in Interactive Dashboard Pages (see "Controlling How Results Are Displayed When Users Drill Down in Interactive Dashboard Pages" on page 1308)

■ Editing the Properties of Interactive Dashboard Prompts and Reports (on page 1308)

■ Applying Formatting to Interactive Dashboards (on page 1310)

Related Topics

See the following topics for related information about interactive dashboards:

■ Creating Interactive Dashboards (on page 1298)

■ Renaming Dashboard Objects (on page 1311)

■ Deleting Dashboard Objects (on page 1311)

■ Changing the Properties of Interactive Dashboards (on page 1316)

■ Changing PDF and Printing Options on Interactive Dashboards (on page 1312)

■ Creating Prompts for Interactive Dashboards (on page 1313)

■ About Guided Navigation in Interactive Dashboards (on page 1320)

Controlling the Appearance of Interactive Dashboard Pages

This topic explains how to control the appearance of the dashboard pages using the dashboard editor. For more information on navigating to the dashboard editor, see Navigating to the Dashboard Editor (on page 1299).

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

Working with Columns in Interactive Dashboard Pages

Columns are used to align the content on a dashboard. The sections within the columns hold the content. You can add or remove columns, set the width in pixels or as a percentage of the dashboard page, and break columns.

When you have more than one column on a dashboard page, you can break the columns to arrange them on the page. (The drag-and-drop feature does not reposition the columns.) For example, if you have two columns side by side, breaking the rightmost column causes it to move beneath the first column, and both columns will span the width originally occupied when they were side by side. If you have three columns side by side, breaking the middle column causes the two outer columns to move beneath the first column, and the first column spans the width originally occupied by the first two columns.

To add a new column

■ Click the Add Column icon near the top of the Dashboard Editor page.

The column is added to the dashboard page.

To set the width of a column

1 Click Properties, and choose Column Properties.

2 In the Column Properties dialog box, expand the Additional Formatting Options link.

3 In the Additional Formatting Options section, specify the column width:

■ To specify the width in pixels, enter the number of pixels, for example, 200.

- To specify the width as a percentage of the dashboard page, use the percent (%) sign, for example, 20%.

4 Click OK.

To break a column

- Click Properties, choose Insert Column Break, and then select the appropriate type of break.

   If you break the column again, the column layout reverts to the previous layout.

Adding Sections to Interactive Dashboard Pages

Sections are used within columns to hold the content of a dashboard. Sections are aligned vertically by default. You can drag as many sections as you want into a column.

If you drag and drop content into a column without first adding a section to hold the content, a section is created automatically.

If you drag a section from one column into another column, any content in that section is also included.

To add a section to a column

- From the selection pane, drag and drop a Section object from the Dashboard Objects area into the column.

   The column is highlighted when you are at an appropriate location in the column to drop the section.

Making Sections Appear Horizontally in Interactive Dashboard Pages

The default alignment for sections is to align them vertically.

To make a section appear horizontally

- Click Properties for the section, and choose Arrange Horizontally.

Saving Changes to Interactive Dashboard Pages

You can save your changes at any time.

To save changes to an interactive dashboard page

Perform one of the following actions:

- Click Save.

- Leave the page that you are working on in the dashboard editor.

For example, your changes are saved if you add or edit another page, change the dashboard properties, or modify a prompt, filter, or request.

Making Content Appear Conditionally on Interactive Dashboard Pages

You can make an entire section of a dashboard and its content appear conditionally based upon the results returned for a particular Oracle CRM On Demand Answers request. You can use this functionality to guide users as they view the dashboards. For more information about guiding users in this way, see About Guided Navigation in Interactive Dashboards (on page 1320).

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To make content appear conditionally on an interactive dashboard page

1   Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see Navigating to the Dashboard Editor (on page 1299).

2   On the Dashboard Editor page, click Properties for the section that contains the content, and then select Guided Navigation.

3   In the Guided Navigation Properties dialog box, specify your choices, and browse to select the request from the Presentation Catalogue.

4   Click OK.

Adding Guided Navigation Links to Interactive Dashboard Pages

Guided navigation links in interactive dashboard pages can be static or conditional. Static links always appear. Conditional links appear only if the results meet certain criteria. You can use this functionality to guide users while they view the dashboards. For more information about guided navigation, see About Guided Navigation in Interactive Dashboards (on page 1320).

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To add a guided navigation link to an interactive dashboard page

1   Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see Navigating to the Dashboard Editor (on page 1299).

2 On the Dashboard Editor page, drag and drop a Guided Navigation Link object from the selection pane into a section in the dashboard page.

3 Click the Properties button for the link.

4 In the Guided Navigation Link Properties dialog box, do the following:

- If you want to make the link conditional, select Yes for the Reference Source Request option and then specify the source request.

- Specify the link properties.

  NOTE: For URLs, provide the full path.

5 Click OK.

Adding Text Links and Image Links to Interactive Dashboard Pages

You can add text links and image links to a dashboard, and specify what is to happen when a user clicks the links. For example, you can direct users to another Web site or dashboard, open documents, launch applications, or perform any other action that your browser supports. You can also add an image or text only, without any links.

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To add a text link or image to an interactive dashboard page

1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see Navigating to the Dashboard Editor (on page 1299).

2 From the selection pane on the Dashboard Editor page, drag and drop a Link or Image object on to a section in the dashboard page.

3 Click the Properties button for the object.

The Link or Image Properties dialog box appears.

4 Specify your choices:

- For a text link, enter the text into the Caption field.

- For an image link, enter the location and name of the image into the Image field.

  Specify the location as a URL. The following are examples:

`http://imageserver/MyImage.gif`

`/DashboardFiles/image.gif`

If the image is not on the local server, the URL must include `http://`. If the image is for use in a shared environment, it must be located on a network drive that is accessible to all users.

If you want a caption for the image, enter a caption for the image in the Caption field, and use the Layout drop-down list to choose where the caption is to appear relative to the image.

5 Specify what is to happen when the user clicks the text or image:

■ To specify that a request or dashboard is to appear when the user clicks the link or image, specify the destination as Request or Dashboard, and click the Browse button to select the request or dashboard.

■ To specify that another action is to occur, such as opening a Web site, document, or program, specify the destination as a URL, and enter the full path into the field that follows the Destination options. In the Target area, choose whether the destination is to appear in the user's existing browser window or in a new window.

A link is defined as any URL (Uniform Resource Locator) that your browser can interpret. URLs can point to Web sites, documents, images, FTP sites, newsgroups, and so on. Depending on your browser, the following are examples of valid URLs:

`http://home.netscape.com/index.html`

`ftp://ftp.microsoft.com`

`news:news.announce.newusers`

See the following table for more information about the kinds of internal or external content to which you can link.

NOTE: Your company administrator can create a virtual directory called \DashboardFiles on the Presentation server for shared documents, and map the virtual directory to a shared network directory of the same name. This virtual directory allows users with the appropriate permissions to publish files to this folder, and reference these files by their relative URL names rather than by their fully qualified network share names, for example, \DashboardFiles\AnnualReport.doc instead of \\SharedServer\CommonShare\DashboardFiles\AnnualReport.doc.

TIP: When choosing whether the destination is to appear in the user's existing browser window or in a new window, note the following information. For every action except sending mail and executing a program, you can control how the link is to appear. Choose the current window when you want the action to occur in the display pane of the dashboard. The dashboard remains active, but in the background. Choose a new window when you want the action to take place in a new browser window.

NOTE: To add text or an image only, without any links, leave the field that follows the Destination options blank.

6 Click OK.

The following table shows link options for adding a text link or image using the dashboard editor.

Link Option	Comments

Link Option	Comments
Web site or document	You must locate the URL, or address, for the site or document. You can copy the destination address from your browser's address or location box, and then paste it. For a Web site, you can omit the `http://` portion of the address if the URL resides on your Web server, such as your intranet site. If the URL resides on your organisation's Web server, you can enter the relative address of the file. For example: `\DashboardFiles\Logo.gif`

Local or shared document	If the document is for use in a shared environment, it must be located on a network drive that is accessible to all users. Examples of the kinds of documents that you can open are spreadsheets containing recent sales reports, a slide presentation introducing a new product, a Microsoft Word document containing your company's annual report, a graphic file that contains a map from the airport to your corporate headquarters, and so on.
	
	For example, if the document is for your use only, a sample location might be:
	
	`c:\mycomputer\reports\report.doc`
	
	For a shared document, specify the UNC name, for example:
	
	`\\ALLUSERS\reports\report.doc`

Send email to a specified user	You must know the mailto URL, for example: `mailto:support@oracle.com` When the user selects this link, the browser launches the email application with the To: field filled in. (The browser controls the launching of the email program.)

Execute a program	If the program is for use in a shared environment, it must be located on a network drive that is accessible to all users. You can use this feature to download and run an application. (The operating system controls the launching of the application.) For example, if you want to launch Microsoft Word for your use only, a sample location might be:
	
	`c:\MSOFFICE\OFFICE\winword.exe`
	
	For a multiuser-licensed program on a shared drive, specify the UNC name for the location, for example:
	
	`\\ALLUSERS\SOFTWARE\MSOFFICE\OFFICE\WORD\winword.exe`

Refresh your browser using JavaScript	Your browser must support JavaScript in order to use the following example. `javascript:window.location.reload()` In the Target area, choose the option Current Window.

Adding Views of Presentation Catalogue Folders to Interactive Dashboard Pages

You can add a view of an Oracle CRM On Demand Presentation Catalogue folder and its contents, such as saved requests, to a dashboard. For example, if you have a collection of saved requests that you run frequently, you can open the folder in the dashboard, navigate to a saved request, and click it to run it.

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To add a view of a Presentation Catalogue folder to an interactive dashboard page

1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see Navigating to the Dashboard Editor (on page 1299).

2 From the selection pane, drag and drop a Folder object on to a section in the dashboard page.

3 Click the Properties button for the folder.

The Folder Properties dialog box appears.

4 Browse to select the folder, and click OK.

5 Click OK to save the properties.

Adding Content Saved in the Presentation Catalogue to Interactive Dashboard Pages

You can add content that you or someone else has already saved in a shared folder or dashboard, such as dashboard prompts and reports. To locate the content, you can browse by looking for the Presentation Catalogue folder that the content is stored in, or for the dashboard that it appears on.

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To add content saved in the Presentation Catalogue to interactive dashboard pages

1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see Navigating to the Dashboard Editor (on page 1299).

2 From the selection pane on the Dashboard Editor page, in the Saved Content area, navigate to the folder or dashboard that contains the content you want to add to the dashboard.

3 Locate the content that you want to add, and drag and drop it into a section in the dashboard page.

This step adds a shortcut to the content that was saved in the Presentation Catalogue. If the content changes, the change will be reflected on the dashboard page.

For information about editing the properties of dashboard prompts and reports, see Editing the Properties of Interactive Dashboard Prompts and Reports (on page 1308).

Controlling How Results Are Displayed When Users Drill Down in Interactive Dashboard Pages

You can control how results are displayed when a user drills down on a report in an interactive dashboard. The results can be displayed in one of the following ways:

- The new results can be displayed directly in the dashboard, replacing the original report.

  This is the default behaviour. The area occupied by the original report is resized automatically to hold the new results.

- The entire dashboard can be replaced with the new results.

This behaviour is controlled by the Drill in Place option in the dashboard editor. The option is set at the section level, which means that it applies to all drillable reports within the section. Users can click the browser's Back button to return to the original report or the dashboard.

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To control how results are displayed when users drill down in interactive dashboard pages

1 Navigate to the dashboard editor.

   For information on navigating to the dashboard editor, see Navigating to the Dashboard Editor (on page 1299).

2 On the Dashboard Editor page, click the Properties button for the section and make your selection for the Drill in Place option:

   - To show the new results directly in the dashboard, click Drill in Place to select it. A check mark appears next to this option when it is selected. This is the default behaviour.

   - To replace the dashboard with the new results, click Drill in Place to remove the check mark.

Editing the Properties of Interactive Dashboard Prompts and Reports

You can edit the properties of interactive dashboard prompts and reports added to a dashboard from the Presentation Catalogue.

NOTE: When you edit the properties of interactive dashboard prompts and reports as described here, any other changes that you made to the page you are working on are also saved.

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To edit the properties of an interactive dashboard prompt

1   Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see Navigating to the Dashboard Editor (on page 1299).

2   On the Dashboard Editor page, click the Properties button for the dashboard prompt and click Modify.

The Dashboard Prompt page appears.

3   Make your changes to the dashboard prompt.

4   Click Save to save the dashboard prompt.

To edit the properties of a report

1   Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see Navigating to the Dashboard Editor (on page 1299).

2   On the Dashboard Editor page, click the Properties button for the report.

3   Select the property that you want to modify:

   ■   Display Results

   If you select the Embedded in Section option, the request will be executed automatically and the results displayed directly in the dashboard. This option is selected by default for reports.

   Alternatively, you can select to display the request as a link that users must click to execute the request, and you can specify whether the results are to show in the dashboard or in a separate window.

   ■   Report Links

   This option opens the Report Links dialog box, where you can select the links that you want to appear with the report on the dashboard page.

   ■   Show View

   This option shows the available views of the report constructed in Oracle CRM On Demand Answers. You can select the view that you want to see.

   ■   Modify Request

   This option displays the Criteria tab in Oracle CRM On Demand Answers, where you can modify the request that generates the report.

Applying Formatting to Interactive Dashboards

In the dashboard editor in Oracle CRM On Demand Answers, a formatting dialog box provides access to and control over the visual attributes of dashboards. Depending on the object that you are formatting, the dialog box displays different options, such as font, cell, and border controls, background colour, and additional formatting options, such as cell padding. The formatting affects the visual appearance of the columns and sections on a dashboard, such as background colour and borders.

When selections for horizontal and vertical alignment appear, they are similar to text justification selections in word processors. Vertical alignment does not have any impact unless the column spans multiple rows of the other columns.

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To apply formatting to an interactive dashboard

1   Navigate to the dashboard editor.

    For information on navigating to the dashboard editor, see Navigating to the Dashboard Editor (on page 1299).

2   In the Dashboard Editor page, click the Properties button for a column or section and choose the Column Properties or Format Section option.

3   In the Font area, make your selections for the font family, size, colour, style (such as bold), and any effects that you want to apply (such as underlining).

    NOTE: For some items, this option is not available.

4   In the Cell area, set up the alignment and background colour.

    NOTE: For horizontal alignment, the most common justification for text data is left. For numeric data, the most common justification is right.

    Vertical alignment does not have any impact unless the column spans multiple rows of other columns.

5   In the Border area, make your selections for the border position, colour, and style of the cell.

    TIP: You can select or deselect custom borders by clicking the top, bottom, left, and right borders near the Position drop-down list.

6   To format spacing within the cell, click Additional Formatting Options and specify values for the width and height of the cell contents, and the space above, below, left and right of the contents.

    Values are specified in pixels.

7   To override the style and class elements specified in Oracle CRM On Demand Answers style sheets, make your selections in the Custom CSS Style Options area:

    a   Click the settings that you want to use.

    b   Provide the location of the class, style, or style sheet.

NOTE: The advanced style formatting options are for users who know how to work with cascading style sheets.

8 Click OK.

Renaming Dashboard Objects

Dashboard objects on an interactive dashboard that do not already have a name are assigned a default name, such as Section 1, Link 1, and so on. You can rename dashboard objects to assign meaningful and descriptive names.

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To rename a dashboard object on an interactive dashboard page

1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see Navigating to the Dashboard Editor (on page 1299).

2 In the Dashboard Editor page, click the Rename button for the dashboard object.

3 In the Rename dialog box, enter a new name for the dashboard object.

4 Click OK.

Deleting Dashboard Objects

You can delete dashboard objects from interactive dashboard pages. If the dashboard object that you delete is already saved in the Oracle CRM On Demand Presentation Catalogue, the object is deleted from the dashboard page only. It is not deleted from the Presentation Catalogue. (Note that users with the appropriate permissions can edit the contents of the Presentation Catalogue by clicking Manage on the Catalogue tab in the selection pane in Oracle CRM On Demand Answers.)

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To delete a dashboard object from an interactive dashboard page

1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see Navigating to the Dashboard Editor (on page 1299).

2 In the Dashboard Editor page, click Delete for the dashboard object.

NOTE: When you delete a column, the other columns on the page might resize automatically to maintain the column alignment.

Changing PDF and Printing Options on Interactive Dashboards

You can specify the page settings and header and footer content for the PDF output from an interactive dashboard. Dashboards and views are printed in Adobe Acrobat PDF format. Adobe Reader 6.0 or greater is required to print using Adobe PDF.

Header and footer formatting appear in HTML and PDF output.

NOTE: The print selections that you specify apply to PDF output only. If you print the PDF on a local or network printer, the print selections specified in your browser are in effect, such as the selection for paper size.

To change PDF and print options

1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see Navigating to the Dashboard Editor (on page 1299).

2 Click the PDF and Print Control Properties icon near the top of the workspace.

The PDF and Print Control dialog box appears.

3 Make your selections for the page settings.

4 To add a header or footer, do the following:

a Select the appropriate option, and click Edit.

b Use the options in the dialog box to construct the header or footer.

Headers and footers can each contain up to three lines.

c To apply cosmetic formatting to a header or footer element, click the formatting button.

For more information on cosmetic formatting, see Applying Formatting to Interactive Dashboards (on page 1310).

d Click OK to save the header or footer.

5 When you finish changing the PDF and printing options, click OK.

Creating Prompts for Interactive Dashboards

A dashboard prompt filters the results of the embedded requests to show only the results that match the prompt criteria. A dashboard prompt can filter all the requests embedded in a dashboard or requests on certain dashboard pages only.

You select the columns and operators for the dashboard prompt, and specify how the prompt appears on the dashboard and how users select the values. Your selections determine the content of the reports embedded in the dashboard or dashboard page. In each request that you want the prompt to filter, every column in the dashboard prompt must be present in either the projection list or in the filter, or both. The columns in the request must have the filters set, or the filter condition has to be set to Is Prompted. Columns contained in the prompt that are not included in the request will not filter the request.

If you include multiple columns in a dashboard prompt, you can constrain users' choices for the subsequent selections. For example, suppose one column filters on Region, and the next column filters on District. By selecting the Constrain check box for District, you can constrain the District column to show only districts consistent with the user's selection for Region. If the user chooses the east region from the Region prompt, the District prompt shows the districts in the east region only.

NOTE: The constrained columns are constrained by all the other columns in the prompt. For example, if the prompt contains columns for Year, Region, and District, and Constrain is checked for District, the values shown in District are limited by the values entered in Region and Year.

If you declare a presentation variable in a dashboard prompt, the variable can also be referenced in various areas of a report. The value entered at the dashboard prompt can then be displayed (using the presentation variable) in request results displayed in the dashboard.

After you create a dashboard prompt, save it in a shared folder. After you save a dashboard prompt, you can add it to a dashboard.

Before you begin. To create and edit prompts for interactive dashboards, your role must include the Manage Dashboards privilege.

To create a prompt for an interactive dashboard

1   Click the Reports tab.

2   Click the Design Analyses link.

   Oracle CRM On Demand Answers is displayed in a separate window.

3   In the Oracle CRM On Demand Answers window, click any subject area, then click the New Dashboard Prompt icon at the top of the section.

   A list of subject areas is displayed.

4   From the list of subject areas, select the subject area that contains the column that you want to use as the filter.

   The Dashboard Prompt page appears.

   NOTE: If the column is also included in a column filter prompt in an embedded request, its value must be set to a filter in the Create/Edit Filter dialog box in order for the dashboard prompt to filter the embedded request. Setting the value to Is Prompted will not prefilter the current column. All columns

in a dashboard prompt must come from the same subject area, and all columns in the dashboard prompt must be included in the embedded requests that you want the dashboard prompt to filter.

5 In the Scope drop-down list on the Dashboard Prompt page, specify whether the dashboard prompt applies to the entire dashboard or a dashboard page.

6 To select a column to use as a filter in the dashboard prompt, click the column name in the selection pane.

You can add multiple columns to a dashboard prompt. If you want to remove a column from the prompt, click Delete for that column.

NOTE: The number of columns that you include in a dashboard prompt can affect performance. For example, columns that show values in a drop-down list require a request to the Oracle CRM On Demand server to populate the list. It is recommended that you limit the number of columns to nine or less.

7 Make your selections for the following options:

a Click the Edit Formula button to display the Edit Column Formula dialog box where you can modify the formula for the column.

b Select the operator that you want to use from the Operator drop-down list.

c Select the Control type to indicate how users select the value for the filter.

The choices are to select the value from a calendar, a drop-down list, or a multiple list of values, or type it into an edit box.

d If you choose a drop-down list:

- In the Show list, indicate which values you want to appear in the drop-down list. (You can show all values or develop an SQL statement to limit the drop-down list to certain values.)

- To constrain the choices for a column depending on the selection the user makes from the previous column, select the Constrain check box.

e In the Default to list, choose the value that you want users to see initially.

You can show the report defaults, all choices, or a specific value. If you select a specific value, a field appears in which you can type the value.

f In the Set Variable list, you can choose whether to populate a variable for the dashboard prompt using a presentation variable.

If you do not want to declare a variable name for this prompt, select None

If you choose Presentation Variable to declare a variable for this prompt, an additional field appears where you declare the variable name.

For example, if you choose Presentation from the drop-down list, you might type myFavouriteRegion to declare this as a presentation variable. A variable declared here can be referenced in requests when viewed in a dashboard.

g In the Label box, type a name to use for the filter label.

If you leave the Label box empty, the column label is used as the filter label.

8 To reorder columns in the prompt, click the up and down arrows.

Reordering the columns controls the order in which the selections appear to users.

9 If you want the selected prompt and all other prompts that follow it to appear on a new line in the filter, click the box in the Group list.

10 To preview how the prompt will appear on the dashboard, click Preview (if available).

To save a prompt for an interactive dashboard

1 When you have finished creating the dashboard prompt, click Save.

2 At the Choose Folder dialog box, save the dashboard prompt to a shared folder, and give the dashboard prompt a descriptive name.

You might also want to indicate in the name whether the dashboard prompt is for an entire dashboard or for a dashboard page.

NOTE: If you save a dashboard prompt in a personal folder, you cannot add the prompt to a dashboard until you move it to a shared folder.

3 (Optional) Type a description in the Description box.

To edit a prompt for an interactive dashboard

1 Click the Reports tab.

2 Click the Design Analyses link.

Oracle CRM On Demand Answers is displayed in a separate window.

3 In the Oracle CRM On Demand Answers window, click the Open Analysis link, and locate the prompt in the folder in which it was saved.

4 Click the dashboard prompt to edit it.

To add a prompt to an interactive dashboard or dashboard page

1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see Navigating to the Dashboard Editor (on page 1299).

2 From the selection pane on the Dashboard Editor page, in the Saved Content area, navigate to the folder containing the dashboard prompt that you want to add.

3 Drag and drop the dashboard prompt into a section in the dashboard page.

If the dashboard prompt's scope is set to Dashboard, the dashboard prompt affects every page of the dashboard, but does not appear on every dashboard page. If the dashboard prompt's scope is set to Page, the dashboard prompt affects only the pages to which you add it. If a dashboard prompt's scope is set to Dashboard, the value selected for the dashboard level prompt overrides the values for the page level dashboard prompts.

Changing the Properties of Interactive Dashboards

You can set the properties for the entire dashboard, such as the style to use, and you can delete, reorder and hide pages. Changing the dashboard properties automatically saves any changes you made to the page that you were working on.

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To access the Dashboard Properties page for an interactive dashboard

1   Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see Navigating to the Dashboard Editor (on page 1299).

2   Click the Dashboard Properties icon near the top of the Dashboard Editor page.

The Dashboard Properties page appears.

Selecting a Style for an Interactive Dashboard

Styles control how dashboards and results are formatted for display. Initially, results are formatted using a default style. Oracle CRM On Demand provides predefined styles that you can choose from.

To select a style for an interactive dashboard

■   In the General Properties area of the Dashboard Properties page, select the style that you want to use from the Style drop-down list.

Adding a Description for an Interactive Dashboard

Descriptions are stored but do not appear on the dashboards.

To add a description for an interactive dashboard

■ Enter a description for the dashboard in the Description box on the Dashboard Properties page.

Renaming, Deleting, Reordering and Hiding Interactive Dashboard Pages

This topic provides procedures that describe how to rename, delete, reorder and hide interactive dashboard pages. The Dashboard Pages area of the Dashboard Properties page shows you the pages for the dashboard. The pages are listed in the same order as their tabs.

When you rename a dashboard you can preserve users' references to the old name. This action creates a shortcut with the old name that points to the renamed dashboard in the Presentation Catalogue.

If you are working with a dashboard page, you can hide it from users until your changes are complete.

CAUTION: You cannot undo the actions described in the following procedures by clicking Cancel.

To rename an interactive dashboard page

■ In the Dashboard Pages section of the Dashboard Properties page, click the Rename icon to open the Rename Item page, and follow the instructions given on that page.

To delete an interactive dashboard page

■ In the Dashboard Pages section of the Dashboard Properties page, click the Delete icon, and confirm the deletion when prompted.

To reorder an interactive dashboard page

■ To move a dashboard page up in the list, click the up arrow for the page in the Dashboard Pages section of the Dashboard Properties page.

On the dashboard, the tab for the page moves to the left.

■ To move a dashboard page down in the list, click the down arrow for the page in the Dashboard Pages section of the Dashboard Properties page.

On the dashboard, the tab for the page moves to the right.

To hide an interactive dashboard page

■ In the Dashboard Pages section of the Dashboard Properties page, select the Hide Page check box for the page.

The page remains visible to any users currently viewing it.

NOTE: You cannot change the permissions on a dashboard page. The Security icon in the Dashboard Pages section of the Dashboard Properties page is disabled.

To change the displayed currency in an interactive dashboard page

■ Choose the currency menu, and choose a new currency for the report.

To use this functionality, you must include the Company Active Currencies prebuilt dashboard prompt in the dashboard. For more information on adding a prebuilt content such as a dashboard prompt to a dashboard, see Creating Prompts for Interactive Dashboards (on page 1313). When you have added this prebuilt dashboard prompt, choose the currency menu, and choose a new currency for the report. All currency fields in the dashboard are updated to display the chosen currency. The list of currencies is limited to those currencies for which an exchange rate has been defined.

Changing the Name or Description of an Interactive Dashboard

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To change the name or description of an interactive dashboard

1 Click the Dashboard tab.

2 On the Dashboard page, click the Manage Dashboards link.

3 On the Manage Dashboards page, click the edit link of the dashboard that you want to change.

4 On the Dashboard Edit page, change the name or description as needed, then click Save.

Displaying Dashboards

Oracle CRM On Demand provides prebuilt dashboards, which group reports into various functional and business areas, including Customer, Marketing Effectiveness, Overview, Pipeline, Sales Effectiveness, and Service. If your role has the Analytics Dashboards – View Prebuilt Dashboards privilege, then you can view these dashboards. In addition, if your role has the Manage Dashboards privilege, then you can create interactive dashboards.

This topic describes how to display prebuilt and interactive dashboards.

NOTE: If your role does not allow you to view a certain report on a dashboard, or if a report was deleted after it was added to the dashboard, an error message appears on the dashboard where the report would have been displayed.

To display a dashboard

1 Click the Dashboard tab.

2 In the Select Dashboard drop-down list, select the dashboard that you want to display.

3 Click Show.

The dashboard appears.

Hiding the Prebuilt Dashboards

If your role has the Manage Dashboards privilege, then you can hide the prebuilt dashboards for other roles. You cannot hide individual dashboards for user roles, but you can either hide all prebuilt dashboards or expose all prebuilt dashboards.

If your company has no custom dashboard, then a user whose role has access to prebuilt dashboards has only the default dashboards in the Select Dashboard drop-down list. If there are no custom or prebuilt dashboard available to that user, then the Select Dashboard drop-down list is empty, and if the user clicks the Show button, then Oracle CRM On Demand displays a message that says *empty page.*

To hide all prebuilt dashboards for a role

1 Navigate to Admin, User Management and Access Controls, and then Role Management.

2 Click Edit for a selected role.

3 Click Step - 4 Privileges.

4 Deselect the check box for the Access Analytics Dashboards - View Prebuilt Dashboards privilege in the Analytics category.

Related Topics

See the following topic for related information:

■ Managing Dashboards (on page 1297)

Changing the Dashboard Order

You can change the order in which prebuilt and custom dashboards appear.

To change the dashboard order

1 Click the Dashboard tab.

2 Click Dashboard Order.

The Display Dashboard Order page appears.

3 Clicking the left arrow and right arrow buttons, move dashboards from the Available Prebuilt Dashboards list to the Prebuilt Dashboards to Appear list.

   NOTE: The maximum number of dashboards that can be displayed in the list is 299. If you create more dashboards, they do not appear in the list.

4 To rearrange the order, click the arrow up and down arrow buttons.

5 Clicking the left arrow and right arrow buttons, move dashboards from the Available Custom Dashboards list to the Custom Dashboards to Appear list.

6 To rearrange the order, click the up arrow and down arrow buttons.

7 Click Save.

If you rename a custom dashboard, it is removed from the Custom Dashboards to Appear list. You must edit the dashboard order to have it reappear.

About Guided Navigation in Interactive Dashboards

Guided navigation can help users to understand business issues and to determine the appropriate actions that they should take, by guiding their exploration of the results obtained from reports. When guided navigation is based on common scenarios and best practises for your industry or organisation, it allows users to see and analyse related issues by navigating to a related set of results, another dashboard, or a URL. Guided navigation is specified using the dashboard editor in Oracle CRM On Demand Answers.

There are three types of guided navigation:

■ Guided navigation using static links. When specified for a request, the results on the dashboard always include a link to another request, a dashboard, or URL. For example, a report that shows trends in gaps in customer satisfaction can always appear with a link to a report that shows customer satisfaction by product line.

■ Guided navigation using conditional links. When specified for a request, a link to another request, dashboard, or URL appears only if the results meet certain criteria. For example, if the number of open critical service requests exceeds a certain threshold, the result set can include a link to a report that shows customer satisfaction by employee.

■ Guided navigation using conditional sections. Entire dashboard sections can appear based upon the results returned for a particular request. For example, if the results show that sales are down by 15 percent or greater in the past week, a dashboard section that contains links to the related reports and tools can appear.

The display of static links does not generally affect the dashboard rendering time. The display of numerous conditional links or sections can affect the dashboard rendering time. For information about the dashboard editor, see Adding and Displaying Content on Interactive Dashboard Pages (on page 1300).

Managing Dashboard Visibility

If you have the Manage Dashboards privilege and the Manage Roles and Access privilege in your role, then you can control the availability (visibility) of individual dashboards. You assign visibility based on user roles. For example, you can select a dashboard and then allow the user roles of Service Rep and Service Manager to display that dashboard.

If you have never assigned any visibility to a dashboard, then that dashboard is unrestricted and can be displayed for all users. Administrators and users with the Manage Custom Reports privilege always have access to all dashboards, even if their role has not been granted access.

Note: The privilege, Access Analytics Dashboards - View Prebuilt Dashboards, controls users' access to prebuilt dashboards, but it does not affect their access to custom dashboards.

To assign visibility to a dashboard

1 Click the Dashboard tab.

2 Click Manage Dashboards.

3 Select a dashboard from the list, and click it to display the Dashboard Detail page.

4 Click Manage Dashboard Visibility.

5 Click Add Roles.

Note: You can add up to 10 roles at one time. To add more roles, click Save and Add Roles in the Associated Roles page, and repeat step 5. The maximum number of roles is 25.

6 In the Associated Roles page, click the search icon on the right side of the field.

The Search for a Role dialog opens.

7 Click the Select link for a role.

The Search for a Role dialog closes and the Associated Roles page now displays the selected role.

8 To add another role, repeat steps 6 and 7.

9 When done adding roles, click Save.

10 Click Back to Dashboard Detail.

To remove a role's visibility to a dashboard

1 Click the Dashboard tab.

2 Click Manage Dashboards.

3 Select a dashboard from the list, and click it to display the Dashboard Detail page.

4 Click Manage Dashboard Visibility.

5 Click Remove next to the role's name.

6 Click Back to Dashboard Detail.

If you remove all roles from the list of roles, then the dashboard is no longer restricted and can be displayed by all users.

Usage Notes on Subject Areas

This topic provides information about date and time subject areas, and quota periods.

Date and Time Subject Areas

Periods in your reports might be based on your company's fiscal calendar, which might differ from a standard calendar. For example, your company's fiscal year might begin on 1 June of each calendar year. If your company has recently changed its fiscal calendar year method in Oracle CRM On Demand, then review carefully historical analyses if they span multiple years. Data in reports based on your previous fiscal calendar method cannot be aligned with data using a new fiscal calendar method.

Quota Periods

Reports that include quota information by year use the closing month of the year. Whereas on the Quota screen, the year shows the starting month of the quota period, which is different from reports. For example, if the quota period runs from November 2009 to January 2010, then the Quota screen shows the year as 2009, but the reports show the year as 2010.

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